

STATE OF CALIFORNIA
Budget Change Proposal - Cover Sheet
DF-46 (REV 08/15)

Fiscal Year 2016-17	Business Unit 0860	Department State Board of Equalization	Priority No. 1
Budget Request Name 0860-400-BCP-DP-2016-MR		Program ALL	Subprogram

Budget Request Description

Centralized Revenue Opportunity System (CROS) Project Implementation Phase – Year 1

Budget Request Summary

The Board of Equalization (BOE) requests \$17.5 million and 43.1 positions (22.5 positions and 20.6 temporary help) in Fiscal Year (FY) 2016-17, to ensure that the Centralized Revenue Opportunity System (CROS) Project has the resources required to begin the Implementation Phase.

The CROS Project (Feasibility Study Report Project 0860-094) is an information technology modernization effort designed to expand tax and fee-payer services, improve the efficiency and effectiveness of the BOE's operations, and enhance its ability to generate increased revenues reducing the tax gap.

Requires Legislation <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		Code Section(s) to be Added/Amended/Repealed	
Does this BCP contain information technology (IT) components? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, departmental Chief Information Officer must sign.</i>		Department CIO <i>B Fleming</i>	Date <i>5/6/2016</i>
For IT requests, specify the date a Special Project Report (SPR) or Feasibility Study Report (FSR) was approved by the Department of Technology, or previously by the Department of Finance. <input type="checkbox"/> FSR <input checked="" type="checkbox"/> SPR Project No. 0860-094 Date: 9/7/2011			

If proposal affects another department, does other department concur with proposal? ☐ Yes ☐ No
Attach comments of affected department, signed and dated by the department director or designee.

Budget Officer <i>Steven Mercer</i>	Date <i>5-2-16</i>	Chief, Financial Management Division <i>John Lafer</i>	Date <i>5/6/16</i>
Deputy Director, Administration <i>Edna Murphy</i>	Date <i>5-9-16</i>	Executive Director <i>David Lee</i>	Date <i>5/9/16</i>

Department of Finance Use Only

Additional Review: <input type="checkbox"/> Capital Outlay <input type="checkbox"/> ITCU <input type="checkbox"/> FSCU <input type="checkbox"/> OSAE <input type="checkbox"/> CALSTARS <input type="checkbox"/> Dept. of Technology	
BCP Type: <input type="checkbox"/> Policy <input type="checkbox"/> Workload Budget per Government Code 13308.05	
PPBA <i>[Signature]</i>	Date submitted to the Legislature <i>5/13/16</i>

Analysis of Problem

A. Budget Request Summary

The Board of Equalization (BOE) requests \$17.5 million and 43.1 positions (22.5 positions and 20.6 temporary help) in Fiscal Year (FY) 2016-17, to ensure that the Centralized Revenue Opportunity System (CROS) Project has the resources required to begin the Implementation Phase.

To determine costs, the Project made assumptions regarding the bidder's Implementation approach to determine resource needs. Based upon the BOE's role as defined in the Request for Proposal (RFP) and Integrated Master Schedule (IMS), BOE departments determined the level of resources needed for the first year. At the core, new CROS positions will be full-time, dedicated to the project. New positions for the BOE Technology Services Division will ensure systems will be prepared for implementation. During the first year, Subject Matter Experts (SMEs) from BOE staff, funded by temporary help or overtime, will provide key knowledge as needed. This results in 22.5 permanent positions and 20.6 temporary help for the CROS Project. See Section D Justification.

In addition, the Contractor will be paid from revenue generated by the solution. Based on the Project assumptions above and the Compensation Rules (RFP BOE 0860-094), the CROS Project is requesting budget bill language to allow up to \$5,000,000 to be made available for possible Contractor payments in FY 16-17. The Project will re-align the Contractor payments in next year's FY 2017-18 Budget Change Proposal (BCP) after contract award.

B. Background/History

Composed of five Board Members, the BOE administers more than 30 tax and fee programs that generate revenue essential to our state. The programs include California's sales and use tax, fuel, alcohol, tobacco, transportation, environmental, excise tax, as well as other special taxes and fees. Over one million discrete businesses currently interact annually with the BOE, many involved with multiple tax and fee programs.

The CROS Project's objective is to establish a responsive and effective tax/fee payer centric system through:

- Replacing its legacy mainframe-based revenue and collection information systems with an integrated and automated tax/fee system;
- Enhancing on-line services to tax/fee payers and other stakeholders;
- Improving case and contact management;
- Re-engineering and improving program processes;
- Improving data sharing capability and real-time data access, especially to field staff; and
- Enhancing the BOE's capability to quickly implement legislative, judicial, or electoral changes to tax/revenue codes.

The Feasibility Study Report (FSR), approved September 2011 redirected BOE resources to the CROS Project to proceed with the Procurement Phase.

The Project submitted a Special Project Report (SPR) (March 2012) and Spring Finance Letter (SFL) for FY 2012-13 to fund the project. At that time, the project included two strategies to prepare for contract award:

- The Parallel Initiative strategy was created to achieve the following objectives:
 - Reduce Project risks related to data cleansing and conversion, and external interfaces.
 - More clearly define RFP business rules in preparation for the system integration.

Analysis of Problem

- The second strategy addressed the audit and collection backlog by adding new auditor and collector positions that would use data that was generated by the Parallel Initiatives. These positions address audit, collection, and registration backlogs to increase revenue.

Based on the approved SPR (Project 0860-094), the FY 2012-13 SFL #1 authorized staffing and funding specifically for the CROS Project's Procurement Phase and Parallel Initiatives.

Resource History
(Dollars in Thousands)

Program Budget	2012-13	2013-14	2014-15
Authorized Expenditures	\$15,203	\$30,100	\$30,100
Actual Expenditures – CROS	\$4,869	\$7,761	\$9,670
Actual Expenditures – Auditors and Collectors	\$5,887	\$17,239	\$18,330
Revenues	\$38,700	\$70,400	\$113,700

The Project submitted SPR #2 in December 2013 which addressed a nine month change in the Procurement schedule and extended the implementation approach by one year as a result of feedback received by bidders in response to the CROS RFI. The Project did not seek additional funding at that time. The current base funding is approximately \$8.4 million and the Project has been managing to this base funding while the Procurement Phase has experienced multiple delays.

The Project submitted a SPR #3 to address a nineteen (19) month delay in the Procurement Phase and ensure the project has resources to start the Implementation Phase. Project Expenditures to date are \$25,424,019. During the Procurement phase, the Parallel Initiatives have completed the following Deliverables:

- Business Rules Library (18,000 individual rules), forms inventory (3,165 forms), reports inventory (4,676 reports), As-Is Process inventory (1,368 processes), and Program Profile (summary of all BOE programs by taxable activity type);
- Created and automated the 10 Revenue Stream Reports, discovered/documentated over 250 data interfaces between BOE and external agencies;
- Discovered 4,431 data quality issues that caused 35 million errors, cleansed over 28 million errors, documented 29 systems, 1,740 tables, and 22,798 data fields;
- Developed/released an RFP with 19 addendums;
- Created an FSR, 3 SPRs;
- Created an Integrated Schedule that encompasses the procurement, pre-implementation activities, implementation readiness, and implementation phases;
- Conducted a gap analysis of the bidder's proposed schedule to the IMS; developed project management plans, including Governance; walked through 44 deliverables and discussed technical capabilities to plan for BOE readiness.

C. State Level Considerations

The BOE collects taxes, fees, and surcharges that provide over 30 percent of the annual revenue for State government and essential funding for counties, cities, and special taxing districts. In FY 2013-14, the BOE administered taxes and fees that produced \$60.4 billion for education, public safety, transportation, housing, health services, social services, and natural resource management. The BOE administers the State's sales and use, fuel, alcohol, tobacco, and other taxes and fees that fund specific programs. More than one million businesses are registered with the BOE.

The CROS Project is consistent with the BOE's Strategic Technology Plan: The 2020 Plan – Roadmap to the Future and advances the BOE's current Strategic Plan goals to:

Analysis of Problem

- Improve the taxpayer experience
- Maximize voluntary compliance
- Enhance operational effectiveness

Successful development and implementation of the CROS Solution will significantly improve the BOE's ability to fulfil its mission to serve the public through fair, effective, and efficient administration of its tax and fee programs, as well as improve its ability to address the State's annual tax gap.

D. Justification

The BOE requests \$17.5 million and 43.1 positions (22.5 positions and 20.6 temporary help) in Fiscal Year (FY) 2016-17, to ensure that the Centralized Revenue Opportunity System (CROS) Project has the resources required to begin the Implementation Phase.

Resource Requests for FY 16-17

The resources required to support implementation activities are derived from the BOE's roles and responsibilities as defined in the RFP. Based upon an October 2016 start date and the Integrated Master Schedule, the project plans for 4 phases during FY 16/17 (see G: Implementation Plan).

Staff Resource Development

The CROS Project staffing roles and responsibilities were developed based on the CROS Project Resource Implementation Plan through analysis of the CROS RFP.

The Resource Implementation Plan organizes project resources in four core functional areas: Business Management, Organizational Change Management (OCM), Technical Management, and Project Management; each of which is led by key staff on the CROS Project. Each functional area includes categories that further define the resources needed for the CROS Project. The project will follow the System Development Life Cycle (SDLC) for each release. The deliverables, tasks, and work breakdown will be organized by SDLC in the Project Schedule. As a result, the Functional Teams will work together throughout each release to complete deliverables.



Numerous meetings were held throughout the BOE to refine resource needs and develop the Implementation Resource Plan. The table below describes the business need for each position, BOE existing resources assigned to the subject area, and the request that fills the gap between need and actual. Each request for permanent staff, temporary help or overtime directly traces to the Resource Implementation Plan. In addition, individuals from the functional teams will be assigned as a resource for the deliverable described in the Project schedule. *Attachment 1 "Justification by Deliverable"* outlines the use of resources for FY 16-17 deliverables.

Analysis of Problem

The following tables describe the Functional Teams, the existing resources for the function and the resources requested in each area:

Functional Group	Description	Existing	New	Temp Help	Overtime
Business Management The Business Management functional area connects the tax and fee programs, their business rules, plans, and customer service needs with the CROS Solution. Business Management resources will focus on the development and quality of business deliverables for the project.		23.0	1.5	3.4	6.8 ¹
Business Analysis	The project plans to continue to use the existing CROS resources to support the business analysis, training, testing, and OCM activities during the implementation. The existing resources cover the functional areas within the scope of the project: Cashiers, Refunds, Registration, Appeals, Collections, Reporting Obligations, and Audits. CROS is asking for temp help and overtime monies to cover the subject matter expertise that may be required to cover: accounting, budget, forms and publications updates, Board proceedings, research and statistics, field operations, petitions, etc.	23.0	1.0	1.2	4.5
Call Center	These resources will support the analysis, design, and testing of Customer Service Center (Avaya) integration with the CROS solution. CROS is asking for overtime monies to cover a subject matter expert regarding BOE's existing Customer Service Center processes, assist with development of test cases, and participate in OCM activities.			0.1	0.1
Data Analysis	These resources will support the analysis and design of the data warehouse and Business Intelligence (BI) solution, learn tools, generate BOE dashboards, and run queries. CROS requests a new position (starting 1-1-17) and overtime monies to cover subject matter expertise from the Data Analysis unit to participate in activities related to business intelligence, data warehouse deployment.		0.5	0.8	2.2
Policy	These resources will provide expertise on BOE policies and procedures and liaise with executive management on the impact of changes to BOE policies related to the			1.3	

¹ PYs used for comparison purposes only, Overtime positions allocated to Blanket Funds

Analysis of Problem

Functional Group	Description	Existing	New	Temp Help	Overtime
	CROS Solution. CROS is asking for temp help monies to cover a subject matter expert covering issues between contractor's solution and BOE's policies/procedures. Gather and provide BOE answers/direction for design values. Liaise with program area on policy issues. Get answers on design issues. Key input to organizational change management. Data retention and archive rules. Geospatial boundaries.				

Functional Group	Description	Existing	New	Temp Help	Overtime
Organizational Change Management The Organizational Change Management (OCM) functional area will facilitate the transition of BOE to the CROS Solution using resources throughout the agency to address challenges that result from changes in business processes, information systems, job roles, and organizational structures.		2.0	3.0	0.5	7.6
Communication	These resources will deliver communications internally and externally about the changes that will be coming with the CROS Solution. CROS is requesting new position for a video communication specialist.	1.0	0.5	0.4	1.7
Org Change Management	These resources will support the development and delivery of specific communications to program areas; assess impact and readiness of program areas; liaise with program areas to communicate changes coming with the CROS Solution; solicit feedback on response to changes; participate in change interventions; identify and clarify program area issues.	1.0	1.0	0.1	5.9
Training	These resources will facilitate training for internal and external users; develop training curriculum and materials; schedule and conduct training. CROS is requesting new positions to cover training lead and training support analyst duties, and clerical support.		1.5		

Analysis of Problem

Functional Group	Description	Existing	New	Temp Help	Overtime
Technical Management The Technical Management functional area connects the BOE technology that supports business programs with the CROS Solution. The Technical Management functional area will focus on development, execution, quality assurance of project technical deliverables and the maintenance and operation of the CROS Solution.		26.0	14.0	6.7	2.4
BOE Infrastructure Support (Existing System)	These resources will support changes to systems and infrastructure including mainframe, databases, network, telecom, distributed servers, and underlying technology components. The Technology Services Department (TSD) is requesting new positions to cover updates to BOE's existing infrastructure while resources are working with the newer technologies on the CROS project.		6.0	1.1	0.5
CROS (New) Infrastructure Support	These resources will support CROS development, test, and production environments; install and configure contractor specified environments as needed; maintain and enhance CROS tools. CROS is asking for a programmer to support changes to CROS technology environments required by the contractor.	3.0	1.0		
Data Conversion Support	These resources will support contractor data conversion; stage and prepare data for conversion to new CROS Solution; prepare and stage test data for User Acceptance Testing (UAT). CROS is asking for subject matter expertise to assist the existing data readiness staff to address conversion issues.	14.0		1.1	0.7
Integration Support	These resources will support the integration of CROS Solution components and support the implementation of external data exchanges.	6.0		1.0	
Security	These resources will ensure necessary security measures are applied and liaise with the Federal Government and other agencies. BOE's security office is asking for 2 new positions to cover security requirements during the implementation.		2.0		0.2
Service Management	These resources will provide ongoing support to the CROS Solution production releases. TSD is asking for 2 new positions to manage releases and 1 new position to work on ready activities to ensure TSD can maintainance and operate the new system.		3.0	3.5	1.0
Technical Testing Support	These resources will provide test data, oversee the contractor's unit, system, integration, performance testing. TSD is asking for new testing positions.		2.0		
Technical Mgmt.		3.0			

Analysis of Problem

Functional Group	Description	Existing	New	Temp Help	Overtime
Project Management Office The Project Management functional area supports the CROS Project through development and implementation of plans, standards and processes for managing the CROS Project, including managing project schedules, risks, resources and costs.		11.0	4.0	8.3	5.9
Compensation Management	This resource supports the compensation model and revenue tracking, 10 benefit stream reports, compensation model outputs, and recommended payment amounts.	1.0			0.6
Contract Management	These resources will manage the system integration contract to ensure compliance.	1.0		0.1	
Deliverable Management	These resources coordinate and manage the deliverable reviews process, including tracking Deliverable Expectation Documents (DEDs), tracking draft and final deliverables, and resolving deliverable issues. BOE and program are asking for new resources to cover this new function during the implementation.	1.0	1.0	7.4	5.3
Project Management	These resources will support CROS project management activities including tracking action items, managing risks and issues, updating project plans, developing status reports, maintaining project schedule and assessing impacts of proposed changes to the schedule, and developing, managing, and enhancing use of SharePoint which is used extensively on the CROS project. CROS is asking for a scheduling resource from TSD to work with CROS and the contractor's schedulers to analyze and maintain schedules.	8.0	3.0	0.8	
BOE Overhead	These resources support the new positions and cover Human Resources, Technology Services and Administration			1.8	0.03
Grand Total		62.0	22.5	20.7*	22.8

*Does not match fiscal detail due to rounding.

Analysis of Problem

Permanent Positions

The BOE requests 22.5 permanent positions for the project. Eight and a half (8.5) positions are designated for the CROS Project Team, twelve (12) are designated for the Technology Services Division, and two (2) are dedicated to the BOE Information Security Office.

- CROS Project Team
 - Project Management:
 - Data Processing Manager II (1.0)
 - Systems Software Specialist I (1.0)
 - Sr. Information Systems Analyst (1.0)
 - Office Technician (1.0)
 - Organizational Change Management
 - Business Taxes Specialist II (1.5)
 - Staff Information Systems Analyst (1.0)
 - Technical Management:
 - Systems Software Specialist II (1.0)
 - Business Management:
 - Business Taxes Administrator II (1.0)
- Technology Services Department
 - Technical Management:
 - Systems Software Specialist II (6.0)
 - Sr. Information Systems Analyst (Supvr.) (1.0)
 - Sr. Information Systems Analyst (2.0)
 - Staff Information Systems Analyst (2.0)
 - Organizational Change Management
 - Staff Information Systems Analyst (0.5)
 - Business Management:
 - Systems Software Specialist II (0.5)
- Information Security Office
 - Technical Management:
 - Systems Software Specialist II (1.0)
 - Sr. Information Systems Analyst (1.0)

Detailed Workload Justifications begin on page 15.

See *Attachment 2 "New Supervisor Org Charts"* for org charts for new supervisory positions requested.

Temporary Help

BOE requests 20.6 temporary help positions for the project. The 20.6 PY are needed to provide subject matter experts and deliverable reviewers for the fiscal year. The requested resources are needed to hire staff to offset the use of existing staff that will be redirected from their normal activities, on a periodic on-call basis, to serve as SMEs, deliverable reviewers, joint application design (JAD) team participants, trainers, and liaisons.

- Business Management: 6,066 hours or 3.4 PY
- Organizational Change Management: 855 hours or 0.5 PY
- Technical Management: 12,019 hours or 6.7 PY
- Project Management: 14,850 hours or 8.3 PY
- BOE Overhead: 1.8 PY

Detailed Workload Justifications begin on page 15.

Analysis of Problem

Overtime

In addition to the new positions, the project requests 40,965 hours to provide overtime hours to offset the use of existing BOE staff that will be redirected from their normal activities, on a periodic on-call basis, to serve as SMEs, JAD design team participants, trainers, and liaisons.

- Business Management: 12,292 hours or 6.8 PY
- Organizational Change Management: 13,675 hours or 7.6 PY
- Technical Management: 4,261 hours or 2.4 PY
- Project Management: 10,692 hours or 5.9 PY
- BOE Overhead: 45 hours or 0.03 PY

Detailed Workload Justifications begin on page 15.

Program Offsets

The BOE program resources to be redirected to CROS include 7.3 PYs for audit and collection resources, and 17.0 PYs for revenue support resources, all of which are currently engaged in BOE revenue generation and revenue support activities.

Based on FY 14-15 Sales and Use Tax Department productivity data, the cumulative impact of redirecting necessary audit and collection program resources to CROS without providing program areas Temporary Help and Overtime offsets to cover auditor and collections workload would result in a loss of approximately \$2.9 million in revenue for the BOE in FY 16-17.

Also, without revenue support resources to cover existing support workload, program areas may be forced to redirect existing program area audit and collection resources to provide revenue support, further jeopardizing the BOE's ability to generate up to \$6.8 million in revenue in FY 16-17.

Realign previously authorized classifications

The proposal also requests funding to realign staff classifications previously authorized in the FY 2012-13 Spring Finance Letter #1. Obtaining staff with the knowledge, experience, and skills needed to ensure the success of the parallel initiatives required adjustments to classification levels which in turn resulted, due to funding allocation constraints, in the need to hold vacant positions that are increasingly impacting the CROS Project. (See *Attachment 3 "Adjustments to Previously Authorized Classifications"*).

Functional Organization Chart

BOE has created a functional organizational chart that defines how the Project will be structured by the activities it needs to fulfill. (See attached *Attachment 4 "Functional Organizational Chart"*)

Special Operating Expenses & Equipment (OE&E) Requests

The Project requests OE&E resources of up to \$14.9 million to support the implementation activities for FY 2016-17. Additional resources are needed to provide support for the following activities:

- Consultant services:
 - CROS Project:
 - Independent Verification & Validation (\$1.5 million)
 - Parallel Initiatives (\$1.9 million)
 - Project Management and Oversight (\$0.2 million)
 - Technology Services Department:
 - Legacy Programmer for TSD (\$0.5 million)
 - Service Management Support (\$0.5 million)
 - Document Management Support (\$0.2 million)
- Provide support of operating expenses for Contractor staff and consultants (\$1.4 million).

Analysis of Problem

- Provide technical training for TSD Staff to ensure that BOE Staff have the key skills required and are prepared to support the project needs (\$0.25 million).
- Provide hardware and software resources for the project (\$0.8 million).

Provisional language is also requested to provide up to \$5 million for vendor compensation payments based on the approved performance-based compensation model if the contractor completes the milestones and deliverables required by the contract prior to June 30, 2017.

E. Outcomes and Accountability

The most significant outcome of the CROS Project is an increase in tax/fee revenues. Implementation Phase activities are projected to increase revenues by \$23.31 million in FY 2016-17. Additional outcomes include improved services to tax/fee payers, improved operational efficiencies, improvements to the tracking of revenues from receipt through distribution, enhanced security, and the ability to more quickly respond to statutory, judicial, or electoral changes to tax/revenue codes changes.

To ensure accountability and best practices, the Project reports directly to the Chief Information Officer (CIO) and has a governance structure that includes an Executive Sponsor from the Program. The Governance Plan defines how the BOE will make decisions and how risks and issues may be escalated for resolution.

The BOE has retained the services of an independent Project Management consultant responsible for ensuring that project management activities, including schedule, costs, scope, and risk management are properly planned and executed. Also, Independent Verification & Validation (IV&V) consultants are being used to verify and validate CROS Project deliverables meet the requirements and fulfill contractual obligations.

The Department of Technology will provide external oversight of the CROS Project's activities and management processes through both an onsite presence and through review and analysis of the CROS Project's monthly Project Reports to ensure that all applicable policies, rules, guidelines, and procedures are followed. The Department of Finance will provide fiscal oversight and monitors the compensation model.

F. Analysis of All Feasible Alternatives

Alternative 1 - Provide funding and positions requested for one (1) year.

- Alternative 1 requests:
 - \$17.5 million, 22.5 positions, and 20.6 temporary help in FY 2016-17
 - \$15.3 million, 24.0 positions, and 20.6 temporary help in FY 2017-18

Pros:

- Ensures that funding fully meets the BOE's needs for the first year of implementation.
- CROS staff involvement will allow BOE to meet its contractual obligations.
- Ensure BOE meet the revenue objectives of the Project.
- New positions provide the skill sets lacking at the agency.
- Temporary Help and Overtime resources help to minimize the impact to existing revenue generation.

Cons:

- Requires ongoing budget augmentations.

Analysis of Problem

Alternative 2 - Provide funding and all permanent positions requested, except redirect existing BOE staff in lieu of authorizing temporary help and overtime.

Alternative 2 requests \$13.3 million, 24.0 positions in FY 2016-17

Pros:

- Ensures that funding meets the BOE's needs for the first year of implementation.
- Reduces overall project costs.
- New positions provide the skill sets lacking at the agency.

Cons:

- Current BOE staff is needed to continue revenue generating activities and may reduce those activities to provide support to the CROS Solution.
- Requires ongoing budget augmentations.

Alternative 3 - Provide funding as requested, except redirect existing CROS project positions and staff in lieu of authorizing new positions.

Alternative 3 requests \$9.9 million operating expenses in FY 16-17

Pros:

- Provides involvement by the BOE in development of a final product to meet the BOE's needs and expectations.
- Reduces overall project costs, while providing funding for Operating Expenses needed.
- Advance the achievement of revenue goals.

Cons:

- Current positions are needed to provide support related to the Parallel Initiatives that are critical to the development of the CROS Solution and will not be available for new workload.
- Current BOE staff is needed to continue revenue generating activities and may reduce those activities to provide support to the CROS Solution.
- Current staff may not be able to provide needed skill-sets.
- Lack of permanent ongoing positions will result in significant staffing instability.
- Requires ongoing budget augmentations.

G. Implementation Plan

As defined in the CROS RFP, the selected bidder will implement the solution in up to five releases. Until contract award, the Project made assumptions regarding the sequence and length of each release. For FY 2016-17, the following releases are planned: pre-implementation activities, Initial Release and the planning segment of Major Release 1 and Major Release 2. The Project will submit a final Implementation Plan after contract award for FY 2017-18.

The planned release strategy used to determine requested resources follows:

- Initial Release: Non-production – 10/2016 to 04/2017
This release will establish the revenue reporting methodology and technology. The Project assumes SMEs in revenue generation processes, business rules, and policies will be involved.
- Major Release 1: Enterprise Data Warehouse/Business Intelligence – 04/2017 to 05/2018

Analysis of Problem

This release stands up and deploys a data warehouse and implements business intelligence, including data analysis capabilities. The Project assumed this release starts after the non-production release and resources will be needed in FY 16-17 to participate in planning activities.

- **Major Release 2: Proof of Concept and Tax Program – 04/2017 to 11/2018**

The BOE is assuming a functionally aligned organization and this release to include all of BOE's tax programs in the planning, analysis, and design of the solution. The testing, training, and deployment will be focused on a sub-set of the programs being implemented. The Project assumed the Call Center (Avaya) and Documentum integration would be part of this release, as well as the development of BOE forms and reports.

- **Major Release: Full System Implementation – 11/2018 to 02/2020**

The Project assumes the same assumptions as the Proof of Concept and Tax Program release, including disaster recovery planning and migration.

- **Transition Period – 02/2020 to 11/2020**

The CROS RFP calls for a 9 month transition period prior to Final State Acceptance of the CROS Solution.

- **Final State Acceptance – 11/2020**

The BOE will accept the completed CROS solution.

- **M&O starts – 11/2020**

This will be a 12 month maintenance and operation agreement with the Contractor, including an option for a second 12 month period.

H. Supplemental Information

Attachment 1 "Justification by Deliverables"

Attachment 2 "New Supervisor Org Charts"

Attachment 3 "Adjustments to Previously Authorized Classifications"

Attachment 4 "Functional Organizational Chart"

Attachment 5 "Implementation Resource Planning Document"

I. Recommendation

Alternative 1 is recommended in order to optimize the CROS Project's successful delivery.

Analysis of Problem

Workload Detail for 0860-300-BCP-DP-2016-A1

Workload Detail A- Business Management Functional Area

Workload Detail B- Organizational Change Management Functional Area

Workload Detail C- Technical Management Functional Area

Workload Detail D- Project Management Office Functional Area

Fiscal Detail

Analysis of Problem

Workload Detail A- Business Management Functional Area

Accounting Administrator I (Overtime) - Revenue Accounting SME - Accounting

The Revenue Accounting SME - Accounting will provide subject matter expertise on revenue accounting business rules and requirements; participate in JADs and deliverable reviews; ensure revenue requirements are addressed in CROS; generate workload reports; provide revenue accounting requirements clarification; develop revenue accounting test cases; develop revenue accounting training aids.

Assumptions: The project will be required to begin accounting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Revenue Accounting SME will be required to participate in JADs with the Contractor to provide clarification on requirements, and insight on current operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 371 Accounting Administrator I, Revenue Accounting SME - Accounting				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	4.0	10	40.0
Participate in deliverable reviews	H	2.0	10	20.0
Provide expertise on revenue requirements; ensure accountings revenue requirements are addressed; generate reports	H	1.6	10	16.0
Total overtime hours				76.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

0.2 Accounting Administrator II (Temp) - Accounting SME

The Accounting SME will ensure accuracy of Automated Clearing House (ACH) Debit banking information; provide feedback on the high level requirement reviews; participate in JADs.

Assumptions: The project will be required to begin accounting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. Accounting SMEs will be required to participate in JADs with the Contractor to provide clarification on requirements, and insight on current Accounting Branch operations, accounting policies, and processes. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 371 Accounting Administrator II, Accounting SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	22.9	10	228.8
Provide expertise on ACH information; ensure accuracy of ACH Debit banking ; provide feedback on requirement reviews	H	10.0	10	100.0
Total temp hours				328.8
Total positions requested (1800 hours/position)				0.2

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

0.1 Accounting Administrator II (Temp) - Business Policy Liaison SME - Accounting

The Business Policy Liaison SME - Accounting will perform gap analysis and resolve issues between the CROS solution and BOE's policies and procedures; gather information and provide direction for design values and design issues; provide input for organizational change management; contribute to data retention and archive rules and geospatial boundaries; draft policies, facilitate clearance processes, as well as incorporate changes into manuals.

Assumptions: The project will be required to begin accounting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There is 1 Business Policy Liaison SME resource from the financial management area specializing in accounting policy. The accounting resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. Revising and creating policies requires the expertise of an accounting SME to recognize policy conflicts and gaps and work with financial management areas and the Contractor to resolve policy issues, draft policies, facilitate clearance processes, as well as incorporate changes into manuals and distribute to staff. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 371				
Accounting Administrator II, Business Policy Liaison SME - Accounting				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Perform gap analysis; resolve policy issues; provide direction on design values	H	4.1	10	141.0
Provide OCM input; contribute to data retention, archive rules, and geospatial boundaries	H	3.0	10	30.0
Total temp hours				171.0
Total positions requested (1800 hours/position)				0.1

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Associate Governmental Program Analyst (Overtime) - Budget Branch SME

The Budget Branch SME will provide subject matter expertise on the sales and use tax allocation processes required by IRIS and participate in JADs.

Assumptions: The project will be required to begin sales and use tax allocation requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Budget Branch SME will be required to participate in JADs with the Contractor to provide clarification on budget requirements, and insight on current Budget Branch operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 365				
Associate Governmental Program Analyst, Budget Branch SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participates in JADs	H	6.0	10	60.0
Provide expertise on sales and use tax allocation processes	H	1.6	10	16.0
Total overtime hours				76.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Associate Governmental Program Analyst (Overtime) - Financial Management Division SME

The Financial Management Division (FMD) SME will provide subject matter expertise on BOE financial management functions related to budgets, accounting, and revenue policies and procedures; participate in JADs.

Assumptions: The project will be required to begin budgets, accounting, and revenue requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Financial Management Division SME will be required to participate in JADs with the Contractor to provide clarification on requirements, and provide insight on Financial Management Division operations. Overtime funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 359				
Associate Governmental Program Analyst, Financial Management Division SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in deliverable reviews	H	30.0	10	300.0
Participate in JADs	H	10.0	10	100.0
Provide expertise on FMD policies	H	5.0	10	50.0
Total overtime hours				450.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

0.04 Business Taxes Administrator I (BOE) (Temp) - Customer Service Center SME - CSC

The Customer Service Center SME - CSC will provide feedback on requirements, designs, and changes related to call center processes based on the integration of Avaya and the CROS solution; participate in JADs; create test cases; document test results.

Assumptions: The project will be required to call center and Avaya requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to planning Call Center (Avaya) and Documentum integration. The Customer Service Center SME - CSC will be required to participate in JADs with the Contractor to provide clarification on call center and Avaya requirements, and insight on current operations, policies, and processes.

This resource is also necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Customer Service Center SME - CSC will be required to participate in JADs with the Contractor to advise on the impacts of revenue policy and process changes on taxpayers, and how to adapt call center scripts, policies and procedures to keep pace with revenue policy changes. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

External Affairs Department, Unit 316				
Business Taxes Administrator I (BOE), Customer Service Center SME - CSC				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	6.0	10	60.0
Provide feedback on requirements	H	1.6	10	16.0
Total temp hours				76.0
Total temp positions requested (1800 hours/position)				0.04

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

0.02 Business Taxes Administrator I (Temp) - Registration SME - STFD

The Registration SME - STFD will provide subject matter expertise on registration functions related to sales and use tax, MTS, and lumber tax; participate in JADs; provide input on policy and procedure changes impacting registration; participate in analysis and design of the CROS solution.

Assumptions: The project will be required to begin registration requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Registration SME - STFD will provide input on policy and procedure changes that affect the registration process, and be required to participate in JADs with the Contractor to provide clarification on registration requirements, and insight on current operations, policies, and processes. Temporary funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Special Taxes and Fees Department, Unit 515 Business Taxes Administrator I, Registration SME - STFD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	3.5	10	35.0
Provide expertise on registration	H	1.0	10	10.0
Total temp hours				45.0
Total positions requested (1800 hours/position)				0.02

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

1.0 Business Taxes Administrator II (BOE) (Permanent) - Test Lead - Program

The Test Lead- Program will plan and manage testing activities; support user acceptance testing of the CROS solution, including 2 testing events for revenue generation, 3 for the Enterprise Data Warehouse, 3 for tax programs, and 2 ad hoc events; develop testing plans for testing related to revenue generation, the Enterprise Data Warehouse, tax programs, as well as ad hoc testing; create test data; develop test case scenarios; plan and schedule testers; manage defect resolution; ensure test facility readiness; define project tasks; manage workload; track defect resolution; provide status reports; monitor risks and issues.

Assumptions: The project will be required to begin user acceptance testing process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to begin building user acceptance plans and user acceptance teams.

CROS Project Team, Unit 487 Business Taxes Administrator II (BOE), Test Lead - Program				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Plan and manage testing activities	H	80.0	10	800.0
Support user acceptance testing; create test data; develop test case scenarios	H	40.0	10	400.0
Manage defect resolution	H	40.0	10	400.0
Provide status reports; monitor risks and issues	H	20.0	10	200.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Representative (Overtime) - Customer Service Center SME - Timber Tax

The Customer Service Center SME - Timber Tax will provide feedback on the requirements, design, and changes to the Customer Service Center processes supporting timber tax administration based on the integration between Avaya and the CROS Solution; participate in JADs; create test cases; document test results.

Assumptions: The project will be required to begin call center and Avaya requirement, policy, and process analysis and planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to planning Call Center (Avaya) and Documentum integration. The Customer Service Center SME – CSC will be required to participate in JADs with the Contractor to provide clarification on call center and Avaya requirements, and insight on current operations, policies, and processes.

This resource is also necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Customer Service Center SME – CSC will be required to participate in JADs with the Contractor to advise on the impacts of revenue policy and process changes on taxpayers, and how to adapt call center scripts, policies and procedures to keep pace with revenue policy changes. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Property Tax Department, Unit 352				
Business Taxes Representative, Customer Service Center SME - Timber Tax				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	6.0	10	60.0
Provide feedback on the requirements	H	1.6	10	16.0
Total overtime hours				76.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) – Audit Field Office SME

The Audit Field Office SME will provide subject matter expertise in field office audit functions; provide analysis and develop recommendations on revenue-generating strategies; analyze current practices and changes warranted by new strategies; develop recommendations on modifications to the recommended revenue-generating strategies, future audit strategies, audit selections, documentation, statistical sampling, and billing functions; assist in the development and review of complex compliance language for policy change documentation, such as memos, manual, and training materials; advise on impacts of strategies to taxpayers; participate in revenue stream reporting; and participate in JADs; collaborate with management and the OCM Team to support policy implementation.

Assumptions: The project will be required to begin audit requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes; to provide expertise in auditing functions, codes, statutes, regulations, policies, audit lifecycle, audit work papers, and other tasks related to auditing business tax accounts. The Audit Field Office SME will be required to participate in JADs with the Contractor to provide clarification on requirements, and insight on current operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Field Operations Department, Unit 440 Business Taxes Specialist I, Audit Field Office SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide analysis and develop recommendations and complex compliance language related to revenue-generating strategies	H	30.0	10	300.0
Participate in JADs	H	20.0	10	200.0
Provide expertise in field office audit and compliance functions	H	10.0	10	100.0
Total overtime hours				600.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) - Audit SME

The Audit SMEs will provide subject matter expertise in special taxes audit functions; provide analysis and develop recommendations on modifications to the recommended revenue-generating strategies, future audit strategies, audit selections, documentation, and statistical sampling, billing functions; advise on impacts of strategies to taxpayers; participate in revenue stream reporting; and participate in JADs.

Assumptions: The project will be required to begin audit requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The project will be required to implement Contractor recommendations on revenue generation policies and processes; existing policies will be revised and new policies will be created in FY 16-17. There are 3 Audit SME resources; 1 specializing in special taxes and 2 specializing in sales and use tax. The Audit SMEs will be required to participate in JADs with the Contractor to provide clarification on audit requirements, operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Special Taxes and Fees Department, Unit 515 and Sales and Use Tax Department, Unit 486				
Business Taxes Specialist I, Audit SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide analysis and develop recommendations on revenue-generating strategies	H	51.1	10	511.3
Participate JADs	H	25.0	10	250.0
Provide expertise on audit functions related to special taxes and fees	H	5.0	10	50.0
Provide expertise on audit functions related to sales and use tax, MTS, and lumber tax	H	10.0	10	100.0
Total overtime hours				911.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. Merged table includes 3 resources; control # 214 and 176.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) - Business Analyst

The Business Analyst will work with program areas and the contractor to clarify and refine business requirements, business rules, forms, and reports; participate in JADs and design activities; participate in user acceptance testing (UAT) and develop test cases; participate in training and the development of training aids.

Assumptions: The project will be required to begin revenue accounting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The project will be required to implement Contractor recommendations on revenue generation policies and processes; existing policies will be revised and new policies will be created in FY 16-17. There are 8 Business Analyst resources; 2 specializing in local revenue accounting; 2 specializing in online services, 2 specializing in return analysis, and 2 specializing in return processing. The Business Analyst will be required to participate in JADs with the Contractor to provide clarification on the allocation requirements, and insight on current operations, policies, and processes. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Multiple Units				
Business Taxes Specialist I, Business Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	40.0	10	400.0
Refine business requirements and business rules; participate in design and training	H	10.0	10	100.0
Participate in UAT				100.0
Total overtime hours				600.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. * Merged table includes 8 resources; control # 180, 177, 178, and 298.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) - Business Analyst Support

The Business Analyst Support will assist in the coordination of business analysis and organizational change management activities; provide analytical support for the Business Manager and Business Analysis Lead; participate in JADs and coordinate JAD support.

Assumptions: The project will be required to begin business requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The project will be required to implement Contractor recommendations on revenue generation policies and processes; existing policies will be revised and new policies will be created in FY 16-17. The Business Analyst Support will be required to participate in JADs with the Contractor to provide comprehensive knowledge across all BOE functional areas within the scope of CROS, provide clarification on business requirements, and insight on current operations, policies, and processes. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 486 Business Taxes Specialist I, Business Analyst Support				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	10.0	10	100.0
Provide support for business analysis	H	5.0	10	50.0
Total overtime hours				150.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Business Taxes Specialist I (Overtime) - Customer Service Center SME

The Customer Service Center SME will provide feedback on the requirements, design, and changes to the Customer Service Center processes based on the integration between Avaya and the CROS Solution; participate in JADs; create test cases and document test results.

Assumptions: The project will be required to begin call center and Avaya requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 2 Customer Service Center SME resources from program areas, including 1 specializing in sale and use tax and 1 specializing in special taxes. These resources are necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to planning Call Center (Avaya) and Documentum integration. These resources will be required to participate in JADs with the Contractor to provide clarification on call center and Avaya requirements, and insight on current operations, policies, and processes. These resources are also necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes and will be required to participate in JADs with the Contractor to advise on the impacts of revenue policy and process changes on taxpayers, and how to adapt call center scripts, policies and procedures to keep pace with revenue policy changes. Overtime funds will be used to backfill behind SMEs diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 450 and Special Taxes and Fees Department, Unit 515 Business Taxes Specialist I, Customer Service Center SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	12.0	10	120.0
Provide feedback on changes to the Customer Service Center processes; create test cases; document test results	H	3.2	10	32.0
Total overtime hours				152.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. * Merged table includes 2 resources; control # 219 and 184.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) - Compliance Field Office SME

The Compliance Field Office SME will provide subject matter expertise in field office compliance functions including collection tools, sources of information to locate taxpayers and assets; Provide analysis and develop recommendations on revenue-generating strategies ; analyze current practices and changes warranted by new strategies; provide feedback on the impact on collections, taxpayers, and current workflows; assist in the development and review of complex compliance language for policy change documentation, such as memos, manual, and training materials; assist with the assessment of existing audit management systems; participate in planning, and design of the CROS Solution; collaborate with management and the OCM Team to support policy implementation.

Assumptions: The project will be required to begin compliance requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Compliance Field Office SME will provide expertise in compliance policies, procedures, and workflows for augmenting collection of accounts receivables and be required to participate in JADs with the Contractor to provide clarification on requirements, and insight on current operations. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Field Operations Department, Unit 440 Business Taxes Specialist I, Compliance Field Office SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide analysis, develop recommendations and complex compliance language related to on revenue-generating strategies	H	30.0	10	300.0
Participate in JADs	H	20.0	10	200.0
Provide expertise on compliance	H	10.0	10	100.00
Total overtime hours				600.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) – Data Analysis SME

The Data Analysis SME will provide analysis and develop recommendations on revenue-generating strategies; provide subject matter expertise on the key performance indicators and reporting, to be developed by the BI solutions and how to develop queries and support tax program audit selection and reporting; provide feedback on the strategy to address DAS and CROS existing data and BI databases; participate in JADs and deliverable reviews; provide key input and support for revenue reporting and compensation models; participate in knowledge transfer related to the data warehouse.

Assumptions: The project will be required to begin data warehouse and business intelligence requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 5 Data Analysis SME resources being requested from program areas; 4 specialize in sales and use tax and 1 specializes in special taxes. These resources are necessary in FY 16-17 to support Major Release: Enterprise Data Warehouse/Business Intelligence activities related to initial planning the deployment of the new data warehouse and business intelligence/data analysis capabilities. The resources will be required to participate in JADs with the Contractor to provide clarification on data analysis requirements, and insight on current operations, policies, and processes. It is anticipated that at times there will need to be more than one DAS SME participating in JADs to provide expertise required. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Multiple Units				
Business Taxes Specialist I, Data Analysis SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide analysis and develop recommendations on revenue-generating strategies	H	146.0	10	1455.6
Participate in JADs	H	95.6	10	955.6
Provide feedback on existing data warehouse and BI databases; provide expertise on KPIs	H	76.3	10	763.1
Provide feedback on Benefit Streams to support compensation model revenue tracking; provide expertise on KPIs	H	76.3	10	763.1
Total overtime hours				3937.4

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. Merged table includes 5 resources; control # 186, 188, 187, and 221.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist II (Overtime) - Data Analysis SME - PPAB

The Data Analysis SME – Program Policy and Administration Branch (PPAB) will provide subject matter expertise on the key performance indicators and reporting for SUTD, to be developed by the BI solutions and how to develop queries and support special tax and fee program audit selection and reporting; provide feedback on the strategy to address DAS and CROS existing data warehouse/BI databases; participate in JADs; provide key input and support for revenue reporting and compensation models; participate in knowledge transfer related to the data warehouse.

Assumptions: The project will be required to begin data warehouse and business intelligence requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release; Enterprise Data Warehouse/Business Intelligence activities related to initial planning for business intelligence and data analysis capabilities. The Data Analysis SME - PPAB specializes in special taxes and fees, covering approximately 30 programs, and will participate in JADs with to provide clarification on requirements, current operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Special Taxes and Fees Department, Unit 515 Business Taxes Specialist II, Data Analysis SME - PPAB				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide feedback on data warehouse and BI databases, key performance indicators; develop queries and dashboards	H	50.8	10	507.5
Participate in JADs	H	10.0	10	100.0
Total overtime hours				607.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Business Taxes Specialist I (Overtime) – Form Developer

The Form Developer will provide form support to the project; analyze and maintain existing forms, recommend form modifications; provide feedback on the prioritization of forms to be implemented; participate in the design of BOE forms generated by the Contractor; facilitate the clearance process for form revisions and new forms; participate in data mapping existing forms information to the new solution; coordinate the update of form information in manuals, training materials and webpages; participate in knowledge transfer of contractor form development tools.

Assumptions: The project will be required to coordinate the update of forms and publications, as well as design new forms in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 2 Form Developer resources from program areas being requested, including 1 resource specializing in sales and use tax, and 1 resource specializing in special taxes. These resources are necessary in FY 16-17 to support Initial Release activities related to incorporating newly establishing revenue reporting policies, and processes into existing forms and publications, as well as to support Major Release: Proof of Concept and Tax Program activities for initial planning, analysis, and design of new forms within the scope of CROS. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 466 and Special Taxes and Fees Department, Unit 515 Business Taxes Specialist I, Form Developer				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide feedback on prioritization of forms to be implemented; create and maintain BOE forms	H	38.0	10	379.8
Total overtime hours				379.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. * Merged table includes 3 resources; control # 292 and 191.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) - Registration SME - SUTD

The Registration SME - SUTD will provide subject matter expertise on registration functions related to sales and use tax, MTS, and lumber tax, as well as participate in JADs; provide input on policy and procedure changes that affect the registration process; participate in the initial planning, analysis, and design of the CROS solution.

Assumptions: The project will be required to begin registration requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Registration SME - SUTD will provide input on policy and procedure changes that affect the registration process, and be required to participate in JADs with the Contractor to provide clarification on registration requirements, and insight on current operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 450 Business Taxes Specialist I, Registration SME - SUTD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	10.0	10	100.0
Provide expertise on registration; participate in JADs	H	5.2	10	51.8
Total overtime hours				151.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) – Report Developer

The Report Developer will create, finalize and maintain BI reports; provide feedback on the prioritization of the BOE reports to be implemented; provide analysis and develop recommendations on revenue-generating strategies; provide feedback on reporting methodology participate in knowledge transfer related to the data warehouse.

Assumptions: The project will be required to begin report requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 4 Report Developer resources being requested from the program areas, 1 specializing in sales and use tax audits, 1 specializing in sales and use tax compliance, 1 specializing in special taxes audits, and 1 specializing in special taxes compliance. These resources are necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to the development of BOE reports. These resources will provide expertise on reporting methodology for their respective area, and participate in the development of reports. These resources will also support Initial Release activities related to establishing revenue reporting technology, policies, and processes in providing key input on revenue generation policy and audit selection strategies. The project anticipates that in FY 16-17 Report Developer resources will work to refine 75 existing BOE BI reports, develop a minimum of 20 new BI reports, as well support the 10 revenue stream reports. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Multiple Units				
Business Taxes Specialist I, Report Developer				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Create, finalize and maintain BI reports	H	120.0	10	1200.0
Provide analysis and develop recommendations on revenue-generating strategies	H	80.0	10	800.0
Provide feedback on reporting methodology	H	40.0	10	400.0
Total overtime hours				2400.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. * Merged table includes 4 resources; control # 296, 297, 211, and 212.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) – Revenue Accounting SME - STFD

The Revenue Accounting SME - STFD will provide subject matter expertise on revenue generation strategies and requirements that impact revenue generated by STFD; participate in JADs; responsible for ensuring accountings revenue requirement are addressed in the solution.

Assumptions: The project will be required to begin revenue accounting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The project will be required to implement Contractor recommendations on revenue generation policies and processes; existing policies will be revised and new policies will be created in FY 16-17. The Revenue Accounting SME - STFD will be required to participate in JADs with the Contractor to provide clarification on revenue accounting requirements, and insight on current operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Special Taxes and Fees Department, Unit 515				
Business Taxes Specialist I, Revenue Accounting SME - STFD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	6.0	10	60.0
Provide expertise on revenue generation strategies	H	1.6	10	16.0
Total overtime hours				76.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist II (Overtime) - Report Developer - DAS

The Report Developer - DAS will provide feedback on BI report generation; provide feedback on the prioritization of the BOE reports to be implemented; create and maintain BOE reports; support BI and advise on key performance indicators and reporting methodology to support tax program audit selection; participate in knowledge transfer related to the data warehouse.

Assumptions: The project will be required to begin report requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release; Proof of Concept and Tax Program activities related to the development of BOE reports. The Report Developer will provide expertise on reporting methodology for their respective area, and participate in the development of reports. The Report Developer will also support Initial Release activities related to establishing revenue reporting technology, policies, and processes in providing key input on revenue generation policy and audit strategies. The project anticipates that in FY 16-17 Report Developer resources will work to refine 75 existing BOE BI reports, develop a minimum of 20 new BI reports, as well support the 10 revenue stream reports. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 450 Business Taxes Specialist II, Report Developer - DAS				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Create, finalize and maintain BI reports	H	30.0	10	300.0
Provide analysis and develop recommendations on revenue-generating strategies	H	20.0	10	200.0
Provide feedback on reporting methodology	H	10.0	10	100.0
Total overtime hours				600.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Business Taxes Specialist I (Overtime) - Reporting Obligations SME

The Reporting Obligations SME will provide subject matter expertise on revenue generation strategies related to reporting obligation functions related to special taxes, sales and use tax, MTS, and lumber tax; participate in JADs.

Assumptions: The project will be required to begin reporting obligation requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 2 Reporting Obligations SME resources being requested, to include 1 specializing in sales and use tax and 1 specializing in special taxes. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The project will be required to implement Contractor recommendations on revenue generation policies and processes; existing policies will be revised and new policies will be created in FY 16-17. The Reporting Obligations SMEs will provide expertise and input to proposed changes, be required to participate in JADs with the Contractor to provide clarification on reporting obligation requirements, and insight on current operations, policies, and processes, and participate in the initial planning, analysis, and design of the CROS solution. Overtime funds will be used to backfill behind SMEs diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Special Taxes and Fees Department, Unit 515 and Sales and Use Tax Department, Unit 450 Business Taxes Specialist I, Reporting Obligations SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	12.0	10	120.0
Provide feedback on revenue generation strategies related to reporting obligation functions	H	3.2	10	32.0
Total overtime hours				152.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. Merged table includes 4 resources; control # 296, 297, 211, and 212.

Research Program Specialist I (Overtime) - Data Analysis SME - Research and Stats

The Data Analysis SME - Research and Stats will provide subject matter expertise on the key performance indicators and reporting for SUTD, to be developed by the BI solutions and how to develop queries and support tax program audit selection and reporting; provide feedback on the strategy to address DAS and CROS existing data warehouse/BI databases; participate in JADs; provide key input and support for revenue reporting and compensation models; participate in knowledge transfer related to the data warehouse.

Assumptions: The project will be required to begin BI requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Enterprise Data Warehouse/BI activities related to initial planning for business intelligence and data analysis capabilities. The Data Analysis SME - Research and Stats will participate in JADs with the Contractor to provide clarification on requirements, and insight on operations, policies, and processes. Overtime funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Executive Department, Unit 307 Research Program Specialist I, Data Analysis SME - Research and Stats				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	40.8	10	407.5
Develop queries and dashboards; provide feedback on BI	H	10.0	10	100.00
Provide expertise on revenue stream reports	H	10.0	10	100.00
Total hours:				607.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

Staff Information Systems Analyst (Specialist) (Overtime) – Form Developer -TSD

The Form Developer - TSD will support the development of the form generating platform for the CROS Solution; support the update of existing BOE forms and design of new forms; participate in knowledge transfer related to the new platform; plan troubleshooting strategies; provide technical support for form development; participate in data mapping existing forms information to the CROS Solution.

Assumptions: The project will be required to coordinate the update of forms and publications, as well as design new forms in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to incorporating newly establishing revenue reporting policies, and processes into existing forms, as well as to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of new forms within the scope of CROS. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381 Staff Information Systems Analyst (Specialist), Form Developer - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Develop the form generating platform; support the update of existing BOE forms and design of new forms	H	15.2	10	151.9
Participate in knowledge transfer related to the new platform; plan troubleshooting strategies	H	15.2	10	151.9
Total overtime hours				303.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Staff Information Systems Analyst (Specialist) (Overtime) – Report Developer - TSD

The Report Developer - TSD will provide feedback on reports to be implemented; create and maintain BOE reports; support BI and advise on key performance indicators and reporting methodology to support program audit selection; provide key input on revenue generation policy; provide support for revenue report and the Contract's compensation calculations; participate in knowledge transfer related to the data warehouse.

Assumptions: The project will be required to begin reporting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to the development of BOE reports. The Report Developer will provide expertise on reporting methodology for their respective area, participate in the development of reports, and support Initial Release activities related to establishing revenue reporting technology, policies, and processes in providing key input on revenue generation policy and audit selection strategies. The project anticipates that in FY 16-17 Report Developer resources will work to refine 75 existing BOE BI reports, develop a minimum of 20 new BI reports, as well support the 10 revenue stream reports. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381 Staff Information Systems Analyst (Specialist), Report Developer - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Create, finalize and maintain BI reports	H	30.0	10	300.0
Support the reporting platform; troubleshoot and resolve technical issues	H	20.0	10	200.0
Provide feedback on reporting methodology	H	10.0	10	100.0
Total overtime hours				600.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

0.1 Tax Counsel III (Supervisor) (Temp) – Legal SME

The Legal SME will provide subject matter expertise on legal functions in support of CROS and organizational change management, as well as participate in JADs.

Assumptions: The project will be required to begin legal requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Legal SME will be required to participate in JADs with the Contractor to provide clarification on legal requirements, and insight on current operations, policies, and processes. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Legal Department, Unit 311				
Tax Counsel III (Supervisor), Legal SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	10.0	10	100.0
Provide expertise on legal functions and OCM	H	8.0	10	80.0
Total temp hours				180.0
Total temp positions requested (1800 hours/position)				0.1

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

1.3 Supervising Tax Auditor II (Temp) - Business Policy Liaison SME

The Business Policy Liaison SME will perform gap analysis and resolve issues between the CROS Solution and BOE policies and procedures; gather and provide BOE direction for design values; liaise with program area on policy issues; get answers on design issues; provide key input to organizational change management; participate in data retention and archive rules and geospatial boundaries.

Assumptions: The project will be required to begin business requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 3 Business Policy Liaison SME resources from program areas; 1 specializing in special taxes and fees policy and 2 specializing in sales and use tax policy. These resources are necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. Revising and creating policies requires the expertise of special taxes and fees business area SMEs to recognize policy conflicts and gaps, work with program areas and the Contractor to resolve policy issues, drafting policies, facilitating clearance processes, as well as incorporating changes into manuals and distributing to staff. Temporary funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 450 and Special Taxes and Fees Department, Unit 498 Supervising Tax Auditor II, Business Policy Liaison SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Assess policy gaps and provide recommendations	H	80.0	10	800.0
Provide direction on policy design issues, liaise with program on policy issues	H	70.0	10	700.0
Participate in data retention, archiving and geospatial policies	H	45.0	10	450.0
Participate in OCM activities	H	30.0	10	300.0
Total temp hours				2250.0
Total temp positions requested (1800 hours/position)				1.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. * Merged table includes 3 resources; control # 215, and 181.

Analysis of Problem

Workload Detail A- Business Management Functional Area

0.04 Supervising Tax Auditor II (Temp) - Refunds SME

The Refunds SME will provide subject matter expertise on refunds function related to special taxes, sales and use tax, mobile telephony services (MTS), and lumber tax, as well as participate in JADs.

Assumptions: The project will be required to begin refund requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 3 Refund SME resources being requested, 2 specializing in sales and use tax and 1 specializing in special taxes. These resources are necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Refunds SMEs will be required to participate in JADs with the Contractor to provide clarification on requirements, and insight on current operations, policies, and processes. Temporary funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 450 and Special Taxes and Fees Department, Unit 515				
Supervising Tax Auditor II, Refunds SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in JADs	H	7.0	10	70.0
Provide expertise on sales and use tax	H	1.0	10	10.0
Provide expertise on refund functions	H	1.0	10	10.0
Total temp hours				90.0
Total temp positions requested (1800 hours/position)				0.04

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. Merged table includes 3 resources; control # 281 and 199.

Analysis of Problem

Workload Detail A- Business Management Functional Area

0.5 Systems Software Specialist II (Technical) (Permanent) - Data Warehouse Developer

The Data Warehouse Developer will participate in the design and installation of the data warehouse; clarify requirements and provide expertise on deliverable reviews; provide requirements analysis; support components, approaches, techniques, tools, and infrastructure; develop extract, transform, and load (ETL) packages; act as data steward to ensure successful data quality and data population; develop data models and ETL scripts to populate data warehouse; create custom reports; participate in knowledge transfer related to the data warehouse architecture and underlying technologies; participate in the maintenance of the CROS replication environment. Position begins 1/1/2017.

Assumptions: The project will be required to begin data warehouse requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff with the required skills and knowledge to support data warehousing; existing data warehousing resources have full workloads serving critical BOE operations, and are unable to absorb the workload required by CROS. This resource is necessary in FY 16-17 to support Major Release: Enterprise Data Warehouse/Business Intelligence activities related to initial planning for the deployment of the new data warehouse to provide advanced expertise on technical and component layers, best practices, tools, and infrastructure related to data warehousing; participate in requirement reviews; support the implementation of the data warehouse.

Technology Services Department, Unit 381 Systems Software Specialist I (Technical), Data Warehouse Developer				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Clarify requirements; provide expertise on deliverable reviews	H	400.0	1	400.0
Participate in design and installation of the data warehouse	H	200.0	1	200.0
Create custom reports	H	200.0	1	200.0
Develop data models and ETL scripts to populate data warehouse	H	100.0	1	100.0
Total hours				900.0
Total positions requested (1800 hours/position)				0.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

0.8 Systems Software Specialist III (Technical) (Temp) – Data Warehouse Support SME - TSD

The Data Warehouse Support SME - TSD will provide support for the CROS Solution and learn the technical aspects of the data warehouse environment during implementation of the data warehouse; participate in data warehouse deliverable reviews; participate in BI deliverable reviews.

Assumptions: The project will be required to begin data warehouse requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Technology Services Department, Unit 381 Systems Software Specialist III (Technical), Data Warehouse Support SME - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Support and learn the data warehouse	H	1000.0	1	1000.0
Participate in data warehouse deliverable reviews	H	200.0	1	200.0
Participate in BI deliverable reviews	H	150.0	1	150.0
Total temp hours				1350.0
Total temp positions requested (1800 hours/position)				0.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures.

Analysis of Problem

Workload Detail A- Business Management Functional Area

0.1 Systems Software Specialist II (Technical) (Temp) - Report Developer - Accounting

The Report Developer - Accounting will provide feedback on BOE reports to be implemented; create and maintain BOE reports; support BI; advise on key performance indicators and reporting methodology to support tax program audit selection; provide input on revenue generation policy; provide support for revenue report and Contract's compensation calculations; participate in knowledge transfer related to the data warehouse.

Assumptions: The project will be required to begin reporting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to the development of BOE reports. The Report Developer will provide expertise on reporting methodology for their respective area, and participate in the development of reports. The Report Developer will also support Initial Release activities related to establishing revenue reporting technology, policies, and processes in providing key input on revenue generation policy and audit strategies. The project anticipates that in FY 16-17 Report Developer resources will work to refine 75 existing BOE BI reports, develop a minimum of 20 new BI reports, as well support the 10 revenue stream reports. Temporary funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Administration Department, Unit 371				
Systems Software Specialist II (Technical), Report Developer - Accounting				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Create, finalize and maintain reports	H	12.5	10	125.0
Provide analysis and develop recommendations	H	10.0	10	100.0
Participate in data mapping	H	10.0	10	100.0
Total temp hours				325.0
Total positions requested (1800 hours/position)				0.1

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

0.5 Tax Research Specialist III (Temp) - Report Developer - Research and Statistics

The Report Developer - Research and Statistics will provide feedback on the prioritization of the BOE reports to be implemented; create and maintain BOE reports.

Assumptions: The project will be required to begin reporting requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities. The Report Developer will provide expertise on reporting methodology for their area and participate in the development of reports. The Report Developer will also support Initial Release activities related to establishing revenue reporting technology, policies, and processes and provide input on revenue generation policy and audit strategies. The project anticipates that in FY 16-17 Report Developer resources will work to refine 75 existing BOE BI reports, develop a minimum of 20 new BI reports, as well support the 10 revenue stream reports. Temporary funds will be used to backfill behind specialists diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Executive Department, Unit 307				
Tax Research Specialist III, Report Developer - Research and Statistics				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Create and maintain BOE reports	H	40.0	10	400.0
Provide analysis and develop recommendations on reports	H	30.0	10	300.0
Participate in JADs	H	20.0	10	200.0
Total temp hours				900.0
Total temp positions requested (1800 hours/position)				0.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail A- Business Management Functional Area

0.3 Tax Research Specialist III (Temp) - Research and Statistics SME

The Research and Statistics SME will provide subject matter expertise on research and statistics in support of CROS and participate in JADs.

Assumptions: The project will be required to begin business analysis requirement, policy, and process analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Enterprise Data Warehouse/BI activities related to initial planning for BI and data analysis capabilities. The Research and Statistics SME will be required to participate in JADs with the Contractor to provide clarification on requirements, and insight on current operations, policies, and processes. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Executive Department, Unit 351 Tax Research Specialist III, Research and Statistics SME				
Activity	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in data warehouse deliverable review	H	20.0	10	200.0
Participate in JADs	H	20.0	10	200.0
Provide research and statistics expertise	H	5.0	10	50.0
Total temp hours				450.0
Total temp positions requested (1800 hours/position)				0.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Assistant Tax Service Specialist (Overtime) - Communications Publications Support - Forms & Pubs

The Communications Publications Support - Forms & Pubs will update BOE forms and publications affected by CROS, including external communications and public relations related communications. The Communications Publications Support- Forms & Pubs will also assist in developing communications regarding changes related to CROS.

Assumptions: The project will be required to coordinate the update of forms and publications, as well as design new forms in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to incorporating newly establishing revenue reporting policies, and processes into existing forms and publications, as well as to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of new forms within the scope of CROS. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 317 Assistant Tax Service Specialist, Communications Publications Support - Forms & Pubs				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Creates new BOE publications affected for external communications and PR-related communications; provide guidance on the development of publications	H	16.0	10	159.6
Total overtime hours				159.6

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

Associate Governmental Program Analyst (Overtime) - Form Developer- Forms and Pubs

The Form Developer- Forms and Pubs will support the update of BOE forms and publications within the scope of CROS; applies BOE standards; facilitate the review, approval, and clearance process for form revisions and new forms and ensures approval agency wide; performs document control management functions to track and ensure quality; participates in evaluation of agency form content; reviews the new design of forms and develops technical specifications and ensures compliance by respective users; releases forms and publications for distribution.

Assumptions: The project will be required to coordinate the update of forms and publications, as well as design new forms in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to incorporating newly establishing revenue reporting policies, and processes into existing forms and publications, as well as to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of new forms within the scope of CROS. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 359				
Associate Governmental Program Analyst, Form Developer- Forms and Pubs				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Update forms; apply standards, ensure approval	H	10.0	81.5	815.0
Performs document control; track and ensure quality; participate in form content; review design	H	10.0	20	200.0
Releases forms and publications for distribution	H	10.0	20	200.0
Total overtime hours				1215.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

Associate Information Systems Analyst (Overtime) -- Program Liaison - TSD

The Program Liaison - TSD will liaise with the OCM Core Team; establish communication channels; communicate targeted messages for program areas regarding project timeline, status, implementation, functionality, policies, procedures, training, and requirements; obtain feedback from program areas; facilitate information sharing; provide on-site expertise to answer questions regarding new policies and procedures; troubleshoot and make recommendations on the resolution of process issues.

Assumptions: The project will be required to begin program communications and assessments in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to provide effective communication critical to the success of the project to engage staff. The Program Liaison - TSD understands the needs and opportunities of their area and can deliver the most effectively communication on how the new system will integrate with their area. Overtime funds will be used to backfill behind analysts temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381 Associate Information Systems Analyst, Program Liaison - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in change interventions; identify and clarify issues	H	71.1	10	711.3
Liaise with program units to communicate changes; solicit feedback on response to changes	H	20.0	10	200.0
Total overtime hours				911.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

Business Taxes Specialist I (Overtime) – Program Liaison - Local

The Program Liaison - Local will liaise with the OCM Core Team; establish communication channels; communicate targeted messages for program areas regarding project timeline, status, implementation, functionality, policies, procedures, training, and requirements; participate in change interventions; identify and clarify issues; obtain feedback from program areas; facilitate information sharing; provide on-site expertise to answer questions regarding new policies and procedures; troubleshoot and make recommendations on the resolution of process issues.

Assumptions: The project will be required to begin program communications and assessments in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 51 Program Liaison - Local resources including 20 compliance and 20 audit resource specializing in field offices functions, 6 resources specializing in headquarters sales and use tax functions, as well as 5 specializing in headquarters special taxes functions. These resources are necessary in FY 16-17 to provide effective communication critical to the success of the project to engage staff, as well as to understand the needs and opportunities of their area and can deliver the most effectively communication on how the new system will integrate with their area. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Multiple Units				
Business Taxes Specialist I, Program Liaison - Local				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in change interventions; identify and clarify issues	H	85.2	50	4260.0
Obtain feedback; facilitate information sharing; troubleshoot and make recommendations on the resolution of process issues	H	65.2	50	3260.0
Establish communication channels and communicate messages to program areas	H	33.2	50	1660.0
Total overtime hours				9180.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures. Merged table includes 51 resources; control # 151, 152, 225, and 197.

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

Graphic Designer III (Overtime) –Graphic Designer - Forms & Pubs

The Graphic Designer - Forms & Pubs will create new BOE publications related to CROS, for external communications and public relation communications; determine scope and creative requirements; interpret and apply agency standards; uses standard techniques of interpreting statistical data; create and correct electronic files; makes publications accessible.

Assumptions: The project will be required to coordinate the update of forms and publications, as well as design new forms in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to incorporating newly establishing revenue reporting policies, and processes into existing forms and publications, as well as to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of new forms within the scope of CROS. This resource will begin planning and developing of approximately 7 new BOE publications in FY 16-17 to address anticipated needs related to CROS implementation related to external communications and PR. This resource is also necessary to proof all forms and publications developed in FY 16-17. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 317 Graphic Designer III, Graphic Designer - Forms & Pubs				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Create new BOE publications; proof forms and publications impacted by CROS	H	25.2	10	252.0
Total overtime hours				252.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Staff Information Systems Analyst (Specialist) (Permanent) - OCM Analyst

The Organizational Change Management (OCM) Analyst will work with project business analysis staff, TSD, and program area staff and management to perform enterprise analysis and document "as-is" and "to-be" environments, including operations and processes, as well as staff knowledge, skill and ability levels, engagement levels, receptiveness to change; perform gap analysis; analyze and document changes in BOE technical support processes; assess the impact of changes to CROS and the BOE; make recommendations; coordinate communications with project communications and training staff; deliver presentations in preparation for organizational changes; participate in the development of change intervention action plans.

Assumptions: The project will be required to develop OCM analysis and communications plans in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no OCM analysts; the project has one OCM Lead. The BOE has no dedicated OCM management or staff currently. The resource is necessary to support the Contractor in the collection of enterprise information critical to planning, analysis, and design of the CROS Solution.

CROS Project Team, Unit 487 Staff Information Systems Analyst (Specialist), OCM Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Perform enterprise analysis; document "as-is" and "to-be" environments	H	90.0	10	900.0
Document changes and assess impact; make recommendations	H	45.0	10	450.0
Coordinate communications; deliver presentations; participate in change intervention planning	H	45.0	10	450.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

0.1 Tax Counsel III (Specialist) (Temp) – Program Liaison - Local - Legal

The Program Liaison - Local – Legal will liaise with the OCM Core Team; establish communication channels; communicate targeted messages for program areas regarding project timeline, status, implementation, functionality, policies, procedures, training, and requirements; obtain feedback from program areas; facilitate information sharing; provide on-site expertise to answer questions regarding new policies and procedures; troubleshoot and make recommendations on the resolution of process issues.

Assumptions: The project will be required to begin program communications and assessments in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to provide effective communication critical to the success of the project to engage staff. The Program Liaison - Local – Legal understand the needs and opportunities of their area and can deliver the most effectively communication on how the new system will integrate with their area. Temporary funds will be used to backfill behind counsel temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Legal Department, Unit 311				
Tax Counsel III (Specialist), Program Liaison - Local - Legal				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Develop communications; assess program impact and readiness; communicate changes	H	18.0	10	180.0
Total temp hours				180.0
Total temp positions requested (1800 hours/position)				0.1

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

1.0 Business Taxes Specialist II (Permanent) - Training Analyst

The Training Analyst- CROS Core will develop training curriculum, materials and training examples; ensure training data availability; conduct end user training; support Training Lead and trainers; deliver solution-related job aides and end user training materials; participate in site visits to roll out new revenue generation policies and procedures; collect feedback and support knowledge gap assessment of program areas regarding new and revised revenue policies and procedures; provide clarification and follow-up training. Position begins 01/01/2017.

Assumptions: The project will be required to develop end user training plans in FY 16-17. Existing BOE training staff will participate in the delivery of training. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to end user training. This resource is necessary in FY 16-17 to plan and execute training of new revenue generation policies and procedures in FY 16-17. The BOE has a limited number of existing staff dedicated to full time training functions; existing training resources have full workloads, and are unable to absorb the full trainer workload required by CROS. The BOE Training Section which provides audit and collection training provides an average of 64 courses per year includes 980 student enrollments and covers topics such as tax law, registration and account maintenance methods, taxpayer interview techniques, skip tracing and collections, and communications. New audit and compliance staff are required to complete these courses during the probationary period. The 7 existing resources are at maximum workload capacity, and cannot cover all of the existing auditor and collector training. The Training Section relies on trainers from field offices to assist in providing auditor and collector training, however, field office trainers are also at maximum workload capacity, with regular field office work and training related to legislative changes. If existing training resources were redirected from existing training functions to CROS, the BOE would lack the resource to continue regular audit and compliance training. The BOE would be out of compliance with the terms of probation which requires staff to be provided with training necessary to effectively perform their duties, including required knowledge of tax laws, best practices, policies and procedures.

CROS Project Team, Unit 487 Business Taxes Specialist II, Training Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Develop job aides and training materials; ensure training data availability	H	25.0	20	500.0
Conduct end user training; support training lead and trainers	H	40.0	10	400.0
Total hours				900.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

1.0 Business Taxes Specialist II (Permanent) - Training Lead

The Training Lead will lead the development of training plans, schedules, curriculum, and training materials; provide guidance to trainers in conducting end user training; ensure the quality of solution-related job aides and end user training materials; participate in site visits to roll out new revenue generation policies and procedures; lead the collection of feedback and support knowledge gap assessment of program areas regarding new and revised revenue policies and procedures; provide status reports; monitor risks and issues.

Assumptions: The project will be required to develop end user training plans in FY 16-17. Existing BOE training staff will participate in the delivery of training. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to end user training. This resource is necessary in FY 16-17 to plan and execute training of new revenue generation policies and procedures in FY 16-17. The BOE has a limited number of existing staff dedicated to full time training functions; existing training resources have full workloads, and are unable to absorb the full trainer workload required by CROS. The BOE section which provides audit and collection training provides an average of 64 courses per year includes 980 student enrollments and covers topics in tax law, registration and account maintenance methods, taxpayer interview techniques, skip tracing and collections, and communications. New audit and compliance staff are required to complete these courses during the probationary period. The 7 existing resources are at maximum workload capacity, and cannot cover all of the existing auditor and collector training. The training section relies on trainers from field offices to assist in providing auditor and collector training, however, field office trainers are also at maximum workload capacity, with regular field office work and training related to legislative changes. If existing training resources were redirected from existing training functions to CROS, the BOE would lack the resource to continue regular audit and compliance training. The BOE would be out of compliance with the terms of probation which requires staff to be provided with training necessary to effectively perform their duties, including required knowledge of tax laws, best practices, policies and procedures.

CROS Project Team, Unit 487 Business Taxes Specialist II, Training Lead				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Plan and manage training activities; ensure training material quality	H	100.0	10	1000.0
Develop training plans; provide status reports	H	10.0	40	400.0
Monitor risks and issues	H	40.0	10.0	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

Business Taxes Specialist II (Overtime) - Video Communications Specialist - Internal

The Video Communications Specialist - Internal will develop internal video communications, lead video production and editing; and coordinate the execution of videos to provide key information on project timeline, status, release timeline and benefits, and training.

Assumptions: The project will be required to increase video communications in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in video communications; there are 5 existing staff dedicated to external communications and video, including televised Board Meetings, Board Member video projects, news releases, media inquiries and social media postings. The BOE also has a part time resource dedicated to taxpayer training and internal video communications which generates 12 videos per year. All existing resources have full workloads providing critical, time sensitive duties and cannot absorb additional workload required by CROS. The Video Communications Specialist - Internal is necessary in FY 16-17 to establish effective communications and increase staff awareness of functionality, benefits, opportunities, and changes related to the project, and will assist in rolling out new revenue generation policy and procedure communications. The resource will develop approximately 12 videos in FY 16-17. The resource will also support OCM efforts to increase staff engagement and increase user acceptance of the CROS Solution. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 450				
Business Taxes Specialist II, Video Communications Specialist - Internal				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Create internal video communications; video production and editing	H	30.8	10	307.5
Plan and design communications	H	30.0	10	300.0
Total overtime hours				607.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Associate Governmental Program Analyst (Overtime) - Proofer - Forms & Pubs

The Proofer - Forms & Pubs will design, create and proof forms and publications related to CROS, including external communications and public relations related communications to support incorporating newly establishing revenue reporting policies, and processes into existing forms and publications.

Assumptions: The project will be required to coordinate the update of forms and publications, as well as design new forms in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to incorporating newly establishing revenue reporting policies, and processes into existing forms and publications, as well as to support Major Release: Proof of Concept and Tax Program activities related to Initial planning, analysis, and design of new forms within the scope of CROS. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 317				
Associate Governmental Program Analyst, Proofer- Forms & Pubs				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Design and create forms	H	37.5	20	750.0
Proof forms and publications impacted by CROS	H	30.0	20	600.0
Total overtime hours				1350.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail B- Organizational Change Management Functional Area

0.5 Staff Information Systems Analyst (Specialist) (Permanent) - Web Services Specialist

The Web Services Specialist will design and update websites affected by CROS, including the BOE's public internet site, the Internet sites for four BOE Board Members, the California Taxpayer Service Center website, and the Internal BOE Intranet; update website content including posting newsletters and videos, as well as policy and procedure updates. Position begins 01/01/2017.

Assumptions: The project will be required to coordinate the update of websites regarding revenue generation policy changes in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in web services; they have full workloads serving critical BOE operations and providing time sensitive services to Board Member offices, and are unable to absorb the workload required by CROS. This resource is necessary in FY 16-17 to support Initial Release activities related to establishing revenue reporting technology, policies, and processes. The Web Services Specialist will ensure updated policies and processes are posted to websites in a timely manner in order to communicate key information to BOE staff and taxpayers.

Technology Services Department, Unit 381 Staff Information Systems Analyst (Specialist), Web Services Specialist				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Design pages; obtain update approvals	H	11.5	40	460.0
Update internet and intranet pages	H	11.0	40	440.0
Total hours				900.0
Total positions requested (1800 hours/position)				0.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

0.4 Tax Service Specialist (Temp) – Forms and Publications SME

The Forms and Publications SME will provide subject matter expertise on BOE forms and publications, established form and publication standards, mandates, proposed form design; advise on the development of a streamlined forms clearance process; Participate in JADs.

Assumptions: The project will be required to coordinate the analysis and update of existing forms and publications, as well as design new forms in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Initial Release activities related to incorporating newly establishing revenue reporting policies, and processes into existing forms and publications, as well as to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of new forms within the scope of CROS. The Forms and Publications SME will be required to participate in JADs with the Contractor to provide clarification on requirements, and insight on current operations, policies, and processes. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Administration Department, Unit 317 Tax Service Specialist, Forms and Publications SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in the design of new forms	H	40.0	10	400.0
Provide expertise on forms, publications, provide assessment of impact of changes; advise on the forms clearance process	H	22.5	10	225.0
Participate in JADs	H	5.0	10	50.0
Total temp hours				675.0
Total positions requested (1800 hours/position)				0.4

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

0.3 Data Processing Manager II (Temp) - Enterprise Architecture Specialist - TSD

The Enterprise Architecture Specialist - TSD will provide support to the CROS Solution regarding current, proposed and implemented architecture; ensure the maintenance of architecture and data dictionary for the CROS Solution and Integrated applications; maintain data architecture, data dictionary, and solution architecture documentation.

Assumptions: The project will be required to begin architecture analysis and planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution. Temporary funds will be used to backfill behind specialists temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Data Processing Manager II, Enterprise Architecture Specialist - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Support architecture; maintain architecture and data dictionary for CROS	H	22.5	10	225.0
Maintain architecture documentation	H	22.5	10	225.0
Total temp hours				450.0
Total temp positions requested (1800 hours/position)				0.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

0.8 Data Processing Manager II (Temp) – TSD Legacy Lead SME - TSD

The TSD Legacy Lead SME - TSD will provide legacy system knowledge; participate in JADs; assist with the system cut-over, conversion, development of migration plans; provide expertise on the process of retiring legacy systems while bringing new systems on line gradually; provide expertise on legacy systems coexisting with new systems for a period of time to enable orderly, controlled transfer of information.

Assumptions: The project will be required to begin developing system migration analysis and planning in FY 16-17. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution.

Justification: The project currently has no resources dedicated to this function. The TSD Legacy Lead SME - TSD expertise is critical to the development of migration plans in FY 16-17. Temporary funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Data Processing Manager II, TSD Legacy Lead SME - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Assist with system cut-over, conversion, migration plans	H	102.0	10	1020.0
Provide legacy system knowledge; provide expertise on retiring legacy systems; provide expertise on legacy systems coexisting with new systems	H	32.0	10	320.0
Participate in JADs	H	10.0	10	100.0
Total temp hours				1440.0
Total temp positions requested (1800 hours/position)				0.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

Staff Information Systems Analyst (Specialist) (Overtime) – Business Rules Developer - TSD

The Business Rules Developer - TSD will learn and administer the rule application and environment; develop new and custom rules for the CROS Solution; administer rule application and environment; develop IT usable rules reflecting business needs.

Assumptions: The project will be required to begin business rule analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The Business Rules Developer - TSD is necessary to support the project in administering IT usable rules reflecting business needs. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Staff Information Systems Analyst (Specialist), Business Rules Developer - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Learn and administer the rule application and environment; administer rule application and environment	H	100.0	10	1000.0
Develop IT usable rules reflecting business needs	H	21.5	10	215.0
Total overtime hours				1215.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Staff Information Systems Analyst (Specialist) (Overtime) – Business Rules Technical Administrator - TSD

The Business Rules Technical Administrator – TSD will learn and administer the rule application and environment of the CROS Solution and legacy systems and administer IT usable rules reflecting business needs.

Assumptions: The project will be required to begin business rule analysis and planning in FY 16-17. The project will implement Contractor recommended changes to revenue generation policies and processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The Business Rules Technical Administrator – TSD is necessary to support the project in administering IT usable rules reflecting business needs. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Staff Information Systems Analyst (Specialist), Business Rules Technical Administrator - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Learn and administer rule application and environment	H	60.8	10	607.5
Total overtime hours				607.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

Staff Information Systems Analyst (Specialist) (Overtime) – Data Management Analyst - TSD

The Data Management Analyst - TSD will work with the Contractor to ensure elements of the data architecture required by the BOE are defined and documented; provide data architecture component definition; support data mapping; provide knowledge of BOE legacy data architecture; validate data management requirements are met. Position begins 01/01/2017.

Assumptions: The project will be required to begin data architecture analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Staff Information Systems Analyst (Specialist), Data Management Analyst - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Ensure data architecture is defined; provide component definition; support data mapping	H	81.5	10	815.0
Provide knowledge of legacy data architecture; ensure data management requirements are met	H	20.0	10	200.0
Participate in data architecture deliverable reviews	H	20.0	10	200.0
Total overtime hours				1215.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Staff Information Systems Analyst (Specialist) (Overtime) – Information Security Officer

The Information Security Officer will assist in review and approval of proposed changes to BOE infrastructure from a security perspective; provide findings and recommendations on proposed changes relative to security aspects.

Assumptions: The project will be required to begin infrastructure security analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Administration Department, Unit 359				
Staff Information Systems Analyst (Specialist), Information Security Officer				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Review and approve proposed changes to BOE Infrastructure; provide findings and recommendations	H	30.4	10.0	303.8
Total overtime hours				303.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

Staff Information Systems Analyst (Specialist) (Overtime) – Infrastructure SME - TSD

The Infrastructure SME - TSD will provide subject matter expertise on Contractor proposed changes to the BOE technical infrastructure; provide additional security monitoring the project and network connectivity for CROS and Consultant staff.

Assumptions: The project will be required to begin infrastructure analysis and design planning in FY 16-17. The project will require additional security monitoring and network connectivity in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in technical infrastructure, security monitoring and network connectivity support; they have full workloads serving critical BOE operations, maintaining existing infrastructure operations, and are unable to absorb additional workload required by CROS. The Infrastructure SME - TSD is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of infrastructure for the CROS Solution. Overtime funds will be used to backfill behind SMEs temporarily diverted from critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources.

Technology Services Department, Unit 381				
Staff Information Systems Analyst (Specialist), Infrastructure SME - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide and maintain network connectivity	H	22.1	17	375.6
Provide expertise on proposed changes to BOE technical Infrastructure	H	15.0	10	150.0
Participate in architecture deliverable reviews	H	30.0	3	90.0
Total overtime hours				615.6

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

1.0 Staff Information Systems Analyst (Specialist) (Permanent) - Security Administrator - User Security Control Group

The Security Administrator - User Security Control Group will provide security administration for BOE employees, taxpayers, customers, and other agencies; manage legacy system security access; participate in the development of Security Access Management plans; participate in security test plans; develop security tests; maintain security matrices; coordinate with program level security officers and security coordinators; ensure separation of duties, exit clearance, adherence to IRS requirements; resolves privacy issues; participate in knowledge transfer related to new security access and control tools and methods.

Assumptions: The project will be required to begin security administration analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated full time to this function. The BOE has a limited number of existing staff specializing in security administration; they have full workloads serving critical BOE operations, and are unable to absorb the workload required by CROS. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution, to create security access and permission plans, and participate in the development of the Security Access Management plan.

Technology Services Department, Unit 381				
Staff Information Systems Analyst (Specialist), Security Administrator - User Security Control Group				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide security administration; manage legacy system security access; resolves privacy issues; participate in knowledge transfer	H	50.0	10	500.0
Coordinate with program level security officers and security coordinators; ensure separation of duties, exit clearance, adherence to IRS requirements	H	50.0	10	500.0
Participate in the development of Security Access Management plans	H	40.0	10	400.0
Participate in security test plans; develop security tests	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

Staff Information Systems Analyst (Specialist) (Overtime) – Security Tester

The Security Tester will support the Contractor and BOE technical security operations in order to ensure the safeguarding of taxpayer data, and maintain compliance with IRS and State security regulations; participate in security requirement review, and the development of security testing plans related to the development and execution of security test scenarios and scripts, as well as and resolution of test defects; provide analysis on interactions of existing BOE environment, policies, procedures, technology and Interagency data exchanges with that of the CROS Solution.

Assumptions: The project will be required to begin security analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in security testing; they have full workloads serving critical BOE operations, and are unable to absorb the workload required by CROS. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Administration Department, Unit 359				
Staff Information Systems Analyst (Specialist), Security Tester				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Participate in security testing; develop and execute security test scenarios; develop scripts; assist in resolving test defects	H	20.4	10	203.8
Support technical security operations; participate in security requirement review, and the development of security testing plans	H	10.0	10	100.0
Total overtime hours				303.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Senior Information Systems Analyst (Specialist) (Permanent) - Access Control Analyst

The Access Control - Analyst will provide oversight of the Access Control solution; review and approve proposed changes to BOE infrastructure; provide security and privacy expertise; review deliverables to ensure security compliance; provide defect notification findings and remediation recommendations; work with the BOE Information Security Office (ISO) to ensure project compliance with federal requirements and develop new access control policies and procedures; participate in the assessment of security measures and design in support data conversion and integration; perform data classification.

Assumptions: The project will be required to begin security and infrastructure analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The resource is necessary to ensure the CROS Solution meets BOE and federal security standards. Security resources will work with the Contractor to plan security and resolve security issues. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution.

Administration Department, Unit 359				
Senior Information Systems Analyst (Specialist), Access Control - Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Monitor access control solution; analyze and approve infrastructure changes; ensure federal compliance; develop new access control policies and procedures	H	10.0	100	1000.0
Provide security and privacy expertise; participate in the assessment of security measures and design in	H	20.0	20	400.0
Review deliverables to ensure security; provide defect notification findings and remediation recommendations	H	20.0	20	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

0.8 Senior Information Systems Analyst (Specialist) (Temp) – Infrastructure Support ISO Analyst

The Infrastructure Support Information Security Office (ISO) Analyst will review and approve proposed changes to BOE infrastructure based on BOE security standards and data exchange agreements with external entities such as the Internal Revenue Service; provide expertise on the complexity of data exchange agreements, applicable security standards, policies and procedures; provide findings and recommendations on solution designs relative to security.

Assumptions: The project will be required to begin infrastructure analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution. Temporary funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Administration Department, Unit 359				
Senior Information Systems Analyst (Specialist), Infrastructure Support ISO				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Review and approve changes to infrastructure	H	50.0	13.5	675.0
Provide expertise on data exchange agreements, applicable security standards, policies and procedures	H	25.0	13.5	337.5
Provide findings and recommendations on solution designs	H	25.0	13.5	337.5
Total temp hours				1350.0
Total positions requested (1800 hours/position)				0.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

0.3 Senior Programmer Analyst (Specialist) (Temp) – Interface Programmer SME - TSD

The Interface Programmer SME - TSD will conduct analysis to develop and transform programs to support automation of interfaces in the interface tool; troubleshoot and resolve interface production problems; develop interface transform logic; develop program unit test cases; document and report on test results.

Assumptions: The project will be required to begin interface automation analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of interfaces supporting the CROS Solution. Temporary funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Senior Programmer Analyst (Specialist), Interface Programmer SME - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Develop programs supporting interface automation; troubleshoot and resolve interface production issues	H	25.0	10	250.0
Develop interface transform logic, unit test cases; document and report on test result	H	20.0	10	200.0
Total temp hours				450.0
Total temp positions requested (1800 hours/position)				0.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

3.5 Senior Programmer Analyst (Specialist) (Temp) – Tax and Fee Developer - TSD

The Tax and Fee Developer - TSD will develop new and custom tax and fee applications to support the CROS Solution.

Assumptions: The project will be required to begin interface automation analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of the CROS Solution. Temporary funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Senior Programmer Analyst (Specialist), Tax and Fee Developer - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Conduct analysis and design changes to legacy systems	H	315.2	10	3152.0
Develop modifications to existing legacy system	H	315.2	10	3152.0
Total temp hours				6304.0
Total temp positions requested (1800 hours/position)				3.5

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Senior Information Systems Analyst (Specialist) (Permanent) - SharePoint Administrator - Front End - TSD

The SharePoint Administrator - Front End - TSD will support CROS use of SharePoint; support the reporting needs of CROS; guide how SharePoint is used, including standards and policies; provide training; ensure user compliance; develop new features as needed by the CROS Project; provide infrastructure support to maintain the SharePoint application including server support, capacity planning, patching and maintaining availability; provide expertise in SQL Server Reporting Services, SharePoint Workflows, SharePoint Design BI Studio, MS Power Query, Excel pivot tables and charts functionality.

Assumptions: The project will be required to utilize SharePoint for collaboration and storage of project artifacts, communications, and reporting purposes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE currently has a limited number of technical SharePoint resources; these resources have full workloads serving critical BOE operations, including business areas utilizing SharePoint to support revenue generation activities, and do not possess the expertise necessary to enhance the application and infrastructure, and as such are unable to absorb the workload required by CROS. The SharePoint Administrator - Front End - TSD is necessary to provide the project with a dedicated, highly technical resource able to enhance the application and infrastructure.

Technology Services Department, Unit 381				
Senior Information Systems Analyst (Specialist), SharePoint Administrator - Front End - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Support SharePoint infrastructure; develop reporting methods, standards and policies	H	50.0	10	500.0
Provide training; ensure user compliance	H	50.0	10	500.0
Develop new SharePoint features	H	40.0	10	400.0
Provide infrastructure support, capacity planning, patching and maintaining availability	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

1.0 Senior Information Systems Analyst (Supervisor) (Permanent) – Technical Change and Configuration Manager - TSD

The Technical Change and Configuration Manager will develop formal change control processes for BOE systems to support changes related to the project; assess, coordinate with the project to communicate changes prior to release into production; work with the release manager to coordinate implementation activities; assess the impact of changes to BOE legacy systems and infrastructure; analyze change control risk and issue impact requests; communicate legislative changes of legacy systems to CROS; participate in knowledge transfer on new system tools and methods.

Assumptions: The project will be required to develop formal change control processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has no resources with the technical knowledge and skills required for technical change and configuration management; the BOE does not have a formal change control process. The Technical Change and Configuration Manager - TSD is needed to develop a formal change control process, as required by the project to support a large volume of system changes and minimize the risk of undocumented and uncommunicated changes introduced into system production; perform the impact analysis; communicate changes.

Technology Services Department, Unit 381				
Senior Information Systems Analyst (Supervisor), Technical Change and Configuration Manager				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Develop formal change control processes; communicate changes prior to release into production	H	100.0	10	1000.0
Coordinate implementation activities; assess the impact of changes to BOE legacy systems and infrastructure; analyze change control risk and issue impact requests	H	40.0	10	400.0
Communicate legislative changes of legacy systems; participate in knowledge transfer	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Senior Information Systems Analyst (Specialist) (Permanent) – Technical Tester - TSD

The Technical Tester - TSD will assist in reviewing testing deliverables; participate in knowledge transfer for testing methods, tools and processes; participate in the development of project testing plans related to testing environments; create test data and test case scenarios; provide test case review feedback and ensuring service-level agreement (SLA) requirement objectives are met.

Assumptions: The project will be required to develop test plans in FY 16-17, to prepare for testing of legacy and concurrent CROS Solution release testing.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in technical testing; they have full workloads serving critical BOE operations and performing testing related to legislative mandates; they are unable to absorb the workload required by CROS. The Technical Tester - TSD resources will need to review deliverables, review requirements specifications, and participate in knowledge transfer for testing prior to performing testing activities.

Technology Services Department, Unit 381				
Senior Information Systems Analyst (Specialist), Technical Tester - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Assist in reviewing deliverables; provide feedback on testing requirements; participate in knowledge transfer for testing methods, tools and processes	H	90.0	10	900.0
Participate in testing planning related to testing environments, test data, test case scenarios, providing test case review and ensuring SLA requirements are met	H	90.0	10	900.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

1.0 Staff Information Systems Analyst (Specialist) (Permanent) - TSD Service Desk Analyst

The TSD Service Desk Analyst will log and resolve end user system issues in the service desk system for BOE legacy systems and the CROS Solution; provide basic support and troubleshooting, reset passwords, configure printers, provide break and fix instructions, and route tickets in accordance with service levels, as well as escalate complex issues to the Contractor and OTech and support the resolution of complex service issues.

Assumptions: The project will require increased service desk support in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in service desk functions; they have full workloads providing current services for legacy systems, and are unable to absorb additional service desk workload resulting from system changes related to new and revised revenue generation technology. The TSD Service Desk Analyst is necessary in FY 16-17 to provide additional service desk support, including a substantial increase in workload related to resolving end user questions, defect resolutions, and troubleshooting

Technology Services Department, Unit 381				
Staff Information Systems Analyst (Specialist), TSD Service Desk Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Log and resolve end user system issues in the HEAT system	H	10.0	100	1000.0
Provide basic support and troubleshooting, reset passwords, configure printers, provide break and fix instructions, and route tickets in accordance with service levels	H	4.0	100	400.0
Escalate complex issues to the Contractor and OTech and support the resolution of complex service issues	H	4.0	100	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Systems Software Specialist II (Technical) (Permanent) - Access Control - Technical Oversight

The Access Control - Technical Oversight will assist the Contractor in implementing an access control solution, including security of data exchanges with external entities; coordinate with the BOE Internal Revenue Service (IRS) liaison on required IRS notifications and statutory requirements for access to and use of Federal Tax Information (FTI); assist in obtaining federal approval on solution components utilizing FTI; review security deliverables; provide findings and recommendations; provide recommendations on remediation of security defects; coordinate with project management on changes to security designs proposed by Contractor.

Assumptions: The project will be required to begin planning network and system designs in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The resource is necessary to provide thorough security deliverable review and ensure the CROS solution meets BOE security goals. Security resources will work with the Contractor to plan security and resolve security issues.

Administration Department, Unit - 359				
Systems Software Specialist II (Technical), Access Control - Technical Oversight				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Assist in implementing access control solution; coordinate required notifications; ensure statutory requirements are met	H	100.0	12	1200.0
Provide recommendations on remediation of security defects; coordinate on changes to security designs	H	10.0	40.0	400.0
Assist in obtaining federal approval on solution components utilizing FTI	H	10.0	10.0	100.0
Review deliverables; provide findings and recommendations	H	10.0	10	100.0
Total hours				1800
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

0.4 Systems Software Specialist II (Technical) (Temp) – Database Administrator - TSD

The Database Administrator - TSD will manage changes to BOE databases consistent with CROS requirements and the design proposed by the Contractor; support data cleansing, transmission of data through interface applications, and interim data warehousing related to the transition of information from legacy systems to the new CROS solution.

Assumptions: The project will be required to begin database analysis and planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The Database Administrator – TSD is necessary to support the project in changing BOE databases in FY 16-17. Temporary funds will be used to backfill behind specialists temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381 Systems Software Specialist II (Technical), Database Administrator - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Manage changes to BOE databases	H	50.0	10	500.0
Support data cleansing, transmission of data through interface applications, interim data warehousing	H	17.5	10	175.0
Total temp hours				675.0
Total temp positions requested (1800 hours/position)				0.4

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Systems Software Specialist II (Technical) (Permanent) - Database/Application Monitoring Analyst

The Database/Application Monitoring Analyst will provide additional security monitoring of intrusion detection and intrusion prevention messages related to the CROS project; configure and manage environments for optimal performance; provide additional security incident and event monitoring related to the additional databases, servers and account activity associated with the CROS project; initiate corrective actions.

Assumptions: The project will be required to begin security monitoring analysis and planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in security monitoring; they have full workloads serving critical BOE operations, and are committed to act as CROS Project SMEs during JADS; they are unable to absorb the workload required by CROS. The Database/Application Monitoring Analyst is necessary to provide continuous monitoring of network and server systems related to increased network and server systems activities and logs; ensure operational integrity and IRS compliance, and manage security risks.

Technology Services Department, Unit 381 Systems Software Specialist II (Technical), Database/Application Monitoring Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide security monitoring related to intrusion detection, intrusion prevention	H	100.0	10	1000.0
Configure and manage environments for optimal performance	H	40.0	10	400.0
Provide security for databases, servers and account activity	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

0.8 Systems Software Specialist II (Technical) (Temp) – Documentum Integration Specialist - TSD

The Documentum Integration Specialist - TSD will support the integration of the CROS Solution and Documentum software; participate in system integration testing; provide feedback and advice on call center integration design; develop plans for integration test cases.

Assumptions: The project will be required to begin Documentum Integration analysis and planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. Temporary funds will be used to backfill behind specialists temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381 Systems Software Specialist II (Technical), Documentum Integration Specialist - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Support integration of the CROS Solution and Documentum software; participate in integration testing	H	100.0	10	1000.0
Provide feedback on call center integration design	H	20.0	10	200.0
Develop integration testing plans	H	15.0	10	150.0
Total temp hours				1350.0
Total temp positions requested (1800 hours/position)				0.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Systems Software Specialist II (Technical) (Permanent) – ECM Content Infrastructure Support

The ECM Infrastructure Specialist will provide technical support for the Enterprise Content Management (ECM) System which receives and stores tax and fee payment documentation; support EMC tools for data storage; coordinate backup and recovery operations; participate in the integration of the ECM System and CROS Solution, participate in enhancements to ECM intake and workflow processes; participate in the development and review of infrastructure deliverables; participate in knowledge transfer related to legacy system and integration; develop system integration and testing plans; participate in system integration and testing; support the integration of CROS solution component; provide ongoing support for existing and new business functionality.

Assumptions: The project will be required to begin ECM System integration and infrastructure analysis and design planning in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in ECM technical infrastructure; they have full workloads serving critical BOE operations, and are unable to absorb the workload required by CROS. The ECM Content Infrastructure Support is necessary to provide advanced technical expertise and lead ECM System support for the project; participate in the development and review of infrastructure deliverables such as the architectural design document; provide input into system planning and designs in FY 16-17.

Technology Services Department, Unit 381 Systems Software Specialist II (Technical), EMC Content Infrastructure Support				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide technical support for ECM System; support EMC tools for data storage; coordinate backup and recovery operations; participate in knowledge transfer	H	25.0	40	1000.0
Participate in the integration of the ECM System and CROS Solution, participate in enhancements to ECM	H	40.0	10	400.0
Develop and review of infrastructure deliverables and system integration and testing plans	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

1.0 Systems Software Specialist II (Technical) (Permanent) – Infrastructure Security Monitor - TSD

The Infrastructure Security Monitor - TSD will manage and monitor the security tools supporting the project; support infrastructure security; plan and implementation new servers; monitor increased server messages, review logs, metrics, reports; correct errors; provide security monitoring of intrusion detection and intrusion prevention messages related to the CROS project; provide security incident and event monitoring related to databases, servers and account activity associated with the CROS project; ensure operational integrity and IRS compliance.

Assumptions: The project will be required to provide additional security monitoring of servers, networks, and systems in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in monitoring infrastructure security; they have full workloads serving critical BOE operations, and are unable to absorb the workload required by CROS. The Infrastructure Security Monitor – TSD is necessary to cover a large increase in server and system monitoring workload, monitor intrusion detection and prevention logs; ensure ongoing operation and maintenance of systems supporting the project and BOE revenue generation, address security risks in a timely manner, and ensure operational integrity and IRS compliance.

Technology Services Department, Unit 381 Systems Software Specialist II (Technical), Infrastructure Security Monitor - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Support infrastructure security and the implementation of new servers; plan and implementation new servers	H	45.0	20	900.0
Provide security monitoring of intrusion detection and intrusion prevention; provide security and event monitoring	H	25.0	20	500.0
Provide security monitoring of databases, servers and account activity; ensure operational integrity and IRS compliance	H	20.0	20	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Systems Software Specialist II (Technical) (Permanent) - Infrastructure SME - TSD

The Infrastructure SME - TSD will provide subject matter expertise on Contractor proposed changes to the BOE technical infrastructure; participate in JADs; provide additional security monitoring the project and network connectivity for CROS and Consultant staff.

Assumptions: The project will be required to begin infrastructure analysis and design planning in FY 16-17. The project will require additional security monitoring and network connectivity in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The BOE has a limited number of existing staff specializing in technical infrastructure, security monitoring and network connectivity support; they have full workloads serving critical BOE operations, maintaining existing infrastructure operations, and are unable to absorb additional workload required by CROS. The Infrastructure SME - TSD is necessary in FY 16-17 to support Major Release: Proof of Concept and Tax Program activities related to initial planning, analysis, and design of infrastructure for the CROS Solution.

Technology Services Department, Unit 381 Systems Software Specialist II (Technical), Infrastructure SME - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Troubleshoot and resolve network issues	H	70.0	10.0	700.0
Provide expertise on proposed changes to BOE technical infrastructure	H	50.0	10	500.0
Provide additional security monitoring and network connectivity	H	50.0	10	500.0
Participate in JADs	H	10.0	10	100.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

1.0 Systems Software Specialist II (Technical) (Permanent) - Infrastructure Support Programmer

The Infrastructure Support Programmer will manage the CROS development, testing, and production environments; support the installation and configuration of Contractor specified environments and provide infrastructure support services; develop environments and data sets.

Assumptions: The project will be required to increase infrastructure support and planning in FY 16-17;

Justification: The project currently has two Systems Software Specialist II (Technical) resources performing IT Operations Lead duties, database administration, infrastructure support, and developer roles. The resource is needed to support the IT Operations Lead and provide numerous environments and data sets to support the revenue generation and data conversion activities.

CROS Project Team, Unit 487				
Systems Software Specialist II (Technical), Infrastructure Support Programmer				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Manage the CROS development, testing, and production environments	H	100.0	10	1000.0
Support the installation and configuration of environments; develop environments and data sets	H	40.0	10	400.0
Provide infrastructure support services	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Systems Software Specialist II (Technical) (Permanent) - SharePoint Administrator - Back End - TSD

The SharePoint Administrator - Back End - TSD will support project use of SharePoint server environment including numerous related databases and interfaces; manage all related backend processes; test new functionality and processes; ensure operational efficiency; plan future updates; support SharePoint as the reporting platform for the implementation of the CROS Solution; guide how SharePoint is used, including standards and policies; provide training for project site administrators, and work directly with project staff to provide SharePoint support; ensure user compliance; develop new features as needed by the CROS Project; provide expertise on SQL Server Reporting Services, SharePoint Workflows, SharePoint Design BI Studio, MS Power Query, Excel pivot tables and charts functionality; provide infrastructure support to maintain the SharePoint application and infrastructure.

Assumptions: The project will be required to utilize SharePoint for collaboration and storage of project artifacts, communications, and reporting purposes.

Justification: The project currently has no resources dedicated to this function. The BOE currently has a limited number of technical SharePoint resources; these resources have full workloads serving critical BOE operations, including business areas utilizing SharePoint to support revenue generation activities, and do not possess the expertise necessary to enhance the application and infrastructure, and as such are unable to absorb the workload required by CROS. The SharePoint Administrator - Back End - TSD is necessary to provide the project with a dedicated, highly technical resource able to enhance the application and infrastructure.

Technology Services Department, Unit 381				
Systems Software Specialist II(Technical), SharePoint Administrator - Back End - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide ongoing maintenance and support of SharePoint environment; including capacity planning and versioning	H	60.0	10	600.0
Support project use of SharePoint server environment including numerous related databases and interfaces	H	40.0	10	400.0
Administer governance standards and policies; provide training; ensure user compliance; develop new features	H	40.0	10	400.0
Provide technical expertise on SharePoint software components	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail C- Technical Management Functional Area

1.0 Systems Software Specialist II (Technical) (Permanent) - TMS Support Analyst

The TMS Support Analyst will support the Contractor in the installation of the CROS Solution, including the Tenant Managed Service (TMS); prepare documentation for the server and network component architecture rack and cabling diagrams for connectivity to electrical, network and security systems; complete documentation needed for Contractor staff admittance to Office of Technology Services (OTech), transport and escort Contractor staff to OTech for services during implementation; coordinate logistics and equipment deliveries; arrange security clearances for Contractor staff; backup server and database/application monitoring staff.

Assumptions: The CROS Solution will be hosted at OTech TMS.

Justification: The project currently has no resources dedicated to this function. Currently, the BOE has no resources providing TMS support as the majority of current BOE systems are not housed at TMS. The BOE has a limited number of existing staff with the necessary skills and knowledge to perform this new function; they have full workloads serving critical BOE operations, and are unable to absorb the workload required by CROS. Also, there are no resources dedicated to network and server architecture support at OTech. The TMS Support Analyst is necessary in FY 16-17 to provide support for the Contractor at TMS, as well as to support the monitoring of network and server logs to ensure operational integrity and IRS compliance.

Technology Services Department, Unit 381				
Systems Software Specialist II (Technical), Network/Server Monitoring Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Support the installation of the CROS Solution Tenant Managed Service; prepare documentation on server and network component architecture rack and cabling diagrams	H	70.0	10	700.0
Liaise with OTech to troubleshoot and resolve problems	H	30.0	10	300.0
Escort Contractor to OTech; coordinate equipment deliveries	H	40.0	10	400.0
Backup server and database/application monitoring staff.	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0
Total temporary positions requested				0.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

2.3 Business Taxes Administrator III (Temp) – Deliverable Reviewer – STFD Program SME

The Deliverable Reviewer – STFD Program SME will review project deliverables including the Training Plan, Technical Review Reports, Requirements Management Plan, Business Intelligence Roadmap, Master Test Plan, Proof of Concept Plan; provide findings and recommendations; attend review meetings; research and provide input into the deliverables review process.

Assumptions: The project will be required to generate and review deliverables in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 3 Deliverable Reviewer resources at the manager level specializing in special taxes being requested. These resources are necessary to provide expertise in collections, audit, return processing, registration, cashiering, accounting, to ensure CROS Solution deliverables are complete and accurate; deliverables scheduled for FY 16-17 include key plans that will directly impact the implementation approach and must be thoroughly reviewed and approved by key staff and management. There are 6 anticipated deliverables and 1 ad hoc event. Deliverable reviews are anticipated to take 30 calendar days to process; some reviewers will be required for up to 160 hours of review time for each deliverables, some will be required for less time. Temporary funds will be used to backfill behind SMEs temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; SMEs possess BOE knowledge and skills not currently found in project resources. Without the funding to fill behind SMEs diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Special Taxes and Fees Department, Unit 515				
Business Taxes Administrator III, Deliverable Reviewer – STFD Program SME				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Review project deliverables including the Training Plan, Technical Review Reports, Requirements Management Plan, Business Intelligence Roadmap, Master Test Plan, Proof of Concept Plan	H	180.0	15	2700.0
Provide findings and recommendations; attend review meetings	H	10.0	90.0	900.0
Research and provide input into the deliverables review process	H	30.0	15	450.0
Total temp hours				4050.0
Total positions requested (1800 hours/position)				2.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

Business Taxes Specialist I (Overtime) – Deliverable Reviewer – SUTD

The Deliverable Reviewer - SUTD will review project deliverables including the Training Plan, Technical Review Reports, Requirements Management Plan, Business Intelligence Roadmap, Master Test Plan, Proof of Concept Plan; provide findings and recommendations; attend review meetings; research and provide input into the deliverables review process

Assumptions: The project will be required to review deliverables in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 3 Deliverable Reviewer resources at the staff level specializing in sales and use tax being requested. These resources are necessary to provide expertise in collections, audit, return processing, registration, cashing, accounting, to ensure CROS Solution deliverables are complete and accurate; deliverables scheduled for FY 16-17 include key plans that will directly impact the implementation approach and must be thoroughly reviewed and approved by key staff and management. There are 6 anticipated deliverables and 1 ad hoc event. Deliverable reviews are anticipated to take 30 calendar days to process; some reviewers will be required for up to 160 hours of review time for each deliverables, some will be required for less time. Overtime funds will be used to backfill behind specialists temporarily diverted from revenue generation functions and critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 466				
Business Taxes Specialist I, Deliverable Reviewer - SUTD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Review project deliverables including the Training Plan, Technical Review Reports, Requirements Management Plan, Business Intelligence Roadmap, Master Test Plan, Proof of Concept Plan	H	160.0	10	1600.0
Provide findings and recommendations; attend review meetings	H	20.5	10	2045.0
Total overtime hours				3645.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

0.1 Data Processing Manager II (Temp) - Deliverable Reviewer - TSD

The Deliverable Reviewer - TSD will be a member of review teams for CROS Solution deliverables including Technical Review Reports, System Architectural Description Document, Database Development Plan, BI Roadmap, Master Test Plan, Data Conversion Plan, Technical Training Plan, Service Level Attainment Reports, Release and Deployment Management Plan.

Assumptions: The project will be required to generate and review deliverables in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There is 1 Deliverable Reviewer resource at the manager level from a technical area being requested. This resource is necessary to provide expertise in collections, audit, return processing, registration, cashing, accounting, to ensure CROS Solution deliverables are complete and accurate; deliverables scheduled for FY 16-17 include key plans that will directly impact the implementation approach and must be thoroughly reviewed and approved by key staff and management. There are 6 anticipated deliverables and 1 ad hoc event. Deliverable reviews are anticipated to take 30 calendar days to process; some reviewers will be required for up to 160 hours of review time for each deliverables, some will be required for less time. Temporary funds will be used to backfill behind reviewers temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381 Data Processing Manager II, Deliverable Reviewer - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Review project deliverables including the Technical Review Reports, System Architectural Description Document, Database Development Plan, BI Roadmap, Master Test Plan, Data Conversion Plan, Technical Training Plan, Service Level Attainment Reports, Release and Deployment Management Plan	H	30.0	6	180.0
Total temp hours				180.0
Total temp positions requested (1800 hours/position)				0.1

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

0.3 Data Processing Manager II (Temp) - MRE Reviewer - TSD

The Management Review Event (MRE) Reviewer - TSD will participate in review teams for CROS Solution Management Review Events (MREs) and provide findings and recommendations during the deliverable review process.

Assumptions: The project will be required to plan MRE activities in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The MRE Reviewer - TSD is necessary to provide ongoing oversight of the Contractor's performance in developing deliverables required for the CROS Solution, and ensure issues with Contractor performance are identified and address in a timely manner. Temporary funds will be used to backfill behind reviewers temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381 Data Processing Manager II, MRE Reviewer - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Research, develop findings and recommendations for MRE process	H	25.0	10.0	250.0
MRE support activities	H	15.0	10.0	150.0
Participate in MRE meetings	H	5.0	10	50.0
Total temp hours				450.0
Total temp positions requested (1800 hours/position)				0.3

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

1.0 Data Processing Manager II (Permanent) - PMO Scheduler

The Project Management Office (PMO) Scheduler maintains the project schedule, reports status, coordinates updates with the Contractor's scheduler; provides input on the impact to the schedule of proposed changes; provides supervision of PMO staff; keeps project management informed of PMO activities; assists in the development of project plans, standards, processes for managing project schedules, risks, resources, and costs.

Assumptions: The project will require a large amount of scheduling support and coordination between the PMO, Technology Services Division, and Consultant in order to integrate project and agency activities. The PMO will grow to support the Implementation Phase; up to three additional PMO staff will be added in FY 16-17, and up to five additional staff in FY 17-18.

Justification: The project currently has a Data Processing Manager III (DPM III) directly supervising three PMO staff. As the project transitions to the Implementation Phase and the PMO grows, the workload of the DPM III will increase. The project will require a subsidiary technical manager to maintain the most complex project schedules and provide supervision to PMO staff, and allow the DPM III to focus on technical duties.

CROS Project Team, Unit 487				
Data Processing Manager II, PMO Scheduler				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Maintain the project schedule; reports status; coordinates schedule updates	H	37.5	24	900.0
Supervise PMO staff; keep project management informed	H	10.0	70	700.0
Assist in the development of project plans, standards, processes	H	20.0	10	200.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Office Technician (Typing) (Permanent) - Deliverable Support

The Deliverable Support will work with the Deliverables Lead to learn and assist in planning deliverable management processes related to deliverable reviews, receiving and logging deliverables; tracking Deliverable Expectation Documents (DEDs), and storing deliverable review artifacts. The Deliverable Support will also assist in the development of training materials for deliverable reviews.

Assumptions: The project will be required to plan deliverable management processes in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The project currently has two Office Technicians which provide clerical support for the project, however those resources have full workloads and are unable to absorb new workload related to deliverables support. The resource is necessary to ensure deliverable management processes are established in a timely manner, according to contractual obligations.

CROS Project Team, Unit 487				
Office Technician (Typing), Deliverable Support				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Assist in planning deliverable management processes	H	1000.0	1	1000.0
Accept, check-in and post deliverables according to filing conventions	H	400.0	1	400.0
Assist in updating, copying and distributing training materials for deliverable reviews	H	400.0	1	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

1.0 Senior Information Systems Analyst (Permanent) - Project Management Analyst

The Project Management Analyst will support the CROS Project Management Office; track and monitor action items, project risks, and issues; escalate issues as needed; update project plans; develop monthly status reports; work with team leads to collect status and research project issues; perform risk and issue analysis; provide backup SharePoint content management for CROS; lead special projects.

Assumptions: The project will be required to increase status reporting, as well as tracking of project action items, risks and issues in FY 16-17.

Justification: The project currently has no resource dedicated solely to this function. The project currently has three project management analysts; however they have full workloads serving critical project functions related to scope, schedule, and deliverables, and are unable to absorb the additional workload. The resource is necessary to cover existing project management workload, as well as new workload related to management of IV&V, deliverable and management performance review functions.

CROS Project Team, Unit 487				
Senior Information Systems Analyst, Project Management Analyst				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Track and monitor action items, risks, and issues; escalate issues	H	1000.0	1	1000.0
Update project plans; develop status reports; perform risk and issue analysis	H	400.0	1	400.0
Backup SharePoint content management	H	400.0	1	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

0.8 Senior Information Systems Analyst (Specialist) (Temp) – Scheduler - TSD

The Scheduler - TSD will work with CROS and Contractor schedulers to analyze and maintain schedules; schedule impact assessments; liaise with project and technical BOE areas to develop and maintain schedule tasks, progress, deadlines, and resources, and assist in coordinating project activities with enterprise wide activities related to legacy system changes, mandates and OTech activities with the project.

Assumptions: The project will require a large amount of scheduling support and coordination between the project, TSD, and Contractor in order to integrate project and agency activities in FY 16-17.

Justification: The project currently has no resources dedicated to this function. The Scheduler – TSD is necessary to track and coordinate Technology Services activities and deadlines with the project; participate in the identification of resources necessary for tasks across the project; assist in identifying and resolving scheduling and resource conflicts to ensure the most effective usage of resources. Temporary funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Senior Information Systems Analyst (Specialist), Scheduler - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Analyze and maintain schedules; schedule impact assessments	H	100.0	10	1000.0
Liaise with project and technical BOE areas to develop and maintain schedule tasks, progress, deadlines, and resources	H	25.0	10	250.0
Assist in coordinating project activities with enterprise wide activities	H	10.0	10	100.0
Total hours				1350.0
Total temp positions requested (1800 hours/position)				0.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

Staff Information Systems Analyst (Specialist) (Overtime) – Deliverable Reviewer - TSD

The Deliverable Reviewer - TSD will be a member of review teams for CROS Solution deliverables including Technical Review Reports, System Architectural Description Document, Database Development Plan, BI Roadmap, Master Test Plan, Data Conversion Plan, Technical Training Plan, Service Level Attainment Reports, Release and Deployment Management Plan; provide findings and recommendations; attend review meetings.

Assumptions: The project will be required to generate and review deliverables in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 36 Deliverable Reviewer resources at the staff level from technical areas being requested. These resources are necessary to provide expertise in collections, audit, return processing, registration, cashing, accounting, to ensure CROS Solution deliverables are complete and accurate; deliverables scheduled for FY 16-17 include key plans that will directly impact the implementation approach and must be thoroughly reviewed and approved by key staff and management. There are 6 anticipated deliverables and 1 ad hoc event. Deliverable reviews are anticipated to take 30 calendar days to process; some reviewers will be required for up to 160 hours of review time for each deliverables, some will be required for less time. Overtime funds will be used to backfill behind analysts temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Technology Services Department, Unit 381				
Staff Information Systems Analyst (Specialist), Deliverable Reviewer - TSD				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Review project deliverables including the Training Plan, Technical Review Reports, Requirements Management Plan, Business Intelligence Roadmap, Master Test Plan, Proof of Concept Plan	H	33.3	15	5000.0
Provide findings and recommendations; attend review meetings	H	9.2	90	416.0
Research and provide input on deliverables review process	H	55.5	15	416.0
Total overtime hours				5832.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

4.8 Supervising Tax Auditor III (BOE) (Temp) - Deliverable Reviewer - Program

The Deliverable Reviewer - Program will review project deliverables including the Training Plan, Technical Review Reports, Requirements Management Plan, Business Intelligence Roadmap, Master Test Plan, Proof of Concept Plan; provide findings and recommendations; attend review meetings.

Assumptions: The project will be required to generate and review deliverables in FY 16-17.

Justification: The project currently has no resources dedicated to this function. There are 36 Deliverable Reviewer resources at the supervisor level from program areas being requested. These resources are necessary to provide expertise in collections, audit, return processing, registration, cashing, accounting, to ensure CROS Solution deliverables are complete and accurate; deliverables scheduled for FY 16-17 include key plans that will directly impact the implementation approach and must be thoroughly reviewed and approved by key staff and management. There are 6 anticipated deliverables and 1 ad hoc event. Deliverable reviews are anticipated to take 30 calendar days to process; some reviewers will be required for up to 160 hours of review time for each deliverables, some will be required for less time. Temporary funds will be used to backfill behind reviewers diverted from revenue generation functions and critical operations to participate in CROS; specialists possess skills not found in project resources. Without the funding to fill behind specialists diverted to CROS, program areas will lose opportunities to generate revenue and provide taxpayer services.

Sales and Use Tax Department, Unit 450				
Supervising Tax Auditor III (BOE), Deliverable Reviewer - Program				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Review project deliverables including the Training Plan, Technical Review Reports, Requirements Management Plan, Business Intelligence Roadmap, Master Test Plan, Proof of Concept Plan	H	432	10.0	4320.0
Provide findings and recommendations; attend meetings	H	432	120.0	4320.0
Total temp hours				8640.0
Total temp positions requested (1800 hours/position)				4.8

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

1.0 Systems Software Specialist I (Technical) (Permanent) - SharePoint Developer

The SharePoint Developer will manage and extend SharePoint functionality and support utilization of tools which integrate with SharePoint; provide expertise of JQuery programming language, SQL Server Reporting Services, SharePoint Workflows, SharePoint Design BI Studio, MS Power Query, Excel pivot tables and charts functionality; develop new SharePoint applications and workflows to increase project efficiency; enhance existing SharePoint functionality; develop standardized SharePoint tool designs to manage the project.

Assumptions: The project will be required to enhance existing SharePoint functionality will be required in FY 16-17.

Justification: The project currently has no resources dedicated to SharePoint development. The BOE has a limited number of existing staff specializing in SharePoint development; they have full workloads supporting critical BOE operations, and are unable to absorb the workload required by CROS. The resource is necessary to ensure SharePoint is developed effectively, in order to support the Contractor and manage the project.

CROS Project Team, Unit 487				
Systems Software Specialist I (Technical), SharePoint Developer				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Manage SharePoint functionality; support tools	H	20.0	50	1000.0
Develop SharePoint applications; enhance functionality	H	40.0	10	400.0
Develop standardized tool designs and solutions	H	40.0	10	400.0
Total hours				1800.0
Total positions requested (1800 hours/position)				1.0

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

Workload Detail D- Project Management Office Functional Area

0.1 Tax Counsel III (Supervisor) (Temp) – BOE Legal Counsel

The BOE Legal Counsel will provide legal support and recommendations to the project management in order to minimize risk exposure.

Assumptions: The project will be required to consult with legal experts on project risks and issues in FY 16-17.

Justification: The project currently has no resources dedicated to this function. This resource is necessary in FY 16-17 to consult with management on legal issues, determine appropriate course of action, and minimize risks. Temporary funds will be used to backfill behind counsel temporarily diverted from critical operations to participate in CROS activities; specialists possess BOE skills not currently found in project resources.

Legal Department, Unit 311				
Tax Counsel III (Supervisor), BOE Legal Counsel				
Activity	Time Measure		Ongoing Activities	
	M=Minutes H=Hours	Time per Occurrence	Occurrences per Year	Total Hours 16-17
Provide legal support and recommendations	H	18.0	10	180.0
Total temp hours				180.0
Total temp positions requested (1800 hours/position)				0.1

* Individual activity row figures may not equal due to rounding format; see Total Hours listed on last row for actual figures

Analysis of Problem

BCP Fiscal Detail Sheet

BCP Title: CROS Project Implementation Phase

DP Name: 0860-400-BCP-DP-2016-MR

Budget Request Summary

	FY16					
	CY	BY	BY+1	BY+2	BY+3	BY+4
Positions - Permanent	0.0	22.5	24.0	24.0	24.0	24.0
Positions - Temporary	0.0	20.6	20.6	20.6	20.6	16.7
Total Positions	0.0	43.1	44.6	44.6	44.6	40.7
Salaries and Wages						
Earnings - Permanent	0	2,067	2,184	2,184	2,184	2,184
Earnings - Temporary Help	0	1,518	1,518	1,518	1,518	1,210
Overtime/Other	0	2,166	2,166	2,137	2,133	2,087
Total Salaries and Wages	\$0	\$5,751	\$6,868	\$5,839	\$5,835	\$5,481
Total Staff Benefits	0	1,796	1,849	1,848	1,847	1,703
Total Personal Services	\$0	\$7,547	\$7,717	\$7,687	\$7,682	\$7,184

Operating Expenses and Equipment

5301 - General Expense	0	1,384	282	263	261	261
5302 - Printing	0	3	3	3	3	3
5304 - Communications	0	121	78	78	78	78
5320 - Travel: Out-of-State	0	41	7	7	0	0
5320 - Travel: In-State	0	82	75	75	0	0
5322 - Training	0	238	235	235	19	19
5324 - Facilities Operation	0	1,177	1,101	1,101	1,101	1,101
5326 - Utilities	0	17	17	17	17	17
5340 - Consulting and Professional Services - External	0	5,141	4,939	4,855	2,936	1,629
5344 - Consolidated Data Centers	0	635	635	635	635	635
5346 - Information Technology	0	654	184	184	180	179
5368 - Non-Capital Asset Purchases - Equipment	0	469	0	0	0	0

Total Operating Expenses and Equipment

	\$0	\$9,962	\$7,556	\$7,453	\$5,230	\$3,922
--	------------	----------------	----------------	----------------	----------------	----------------

Total Budget Request

	\$0	\$17,509	\$15,273	\$15,140	\$12,912	\$11,106
--	------------	-----------------	-----------------	-----------------	-----------------	-----------------

Fund Summary

Fund Source - State Operations

0001 - General Fund	0	9,379	8,181	8,110	6,916	5,949
0004 - Breast Cancer Fund	0	7	6	6	5	5
0022 - State Emergency Telephone Number Account	0	32	28	28	24	20
0061 - Motor Vehicle Fuel Account, Transportation Tax Fund	0	1,909	1,665	1,651	1,408	1,211
0070 - Occupational Lead Poisoning Prevention Account	0	1	1	1	1	1
0080 - Childhood Lead Poisoning Prevention Fund	0	7	6	6	5	4
0230 - Cigarette and Tobacco Products Surtax Fund	0	92	80	79	68	58
0320 - Oil Spill Prevention and Administration Fund	0	9	8	7	6	6
0367 - Integrated Waste Management Account, Integrated Waste Management Fund	0	14	12	12	10	9
0439 - Underground Storage Tank Cleanup Fund	0	96	84	83	71	61
0465 - Energy Resources Programs Account	0	19	17	16	14	12
0623 - California Children and Families First Trust Fund	0	177	154	153	130	112
0865 - Timber Tax Fund	0	1	1	1	1	1
3015 - Gas Consumption Surcharge Fund	0	175	153	152	129	111
3058 - Water Rights Fund	0	2	2	2	2	1
3065 - Electronic Waste Recovery and Recycling Account, Integrated Waste Management Fund	0	58	50	50	42	37
3067 - Cigarette and Tobacco Products Compliance Fund	0	1	1	1	1	0
0995 - Reimbursements	0	5,530	4,824	4,782	4,079	3,508
Total State Operations Expenditures	\$0	\$17,509	\$15,273	\$15,140	\$12,912	\$11,106
Total All Funds	\$0	\$17,509	\$15,273	\$15,140	\$12,912	\$11,106

Analysis of Problem

Program Summary

Program Funding

0570050 - State-Assessed Property Program	0	304	266	283	224	193
0570075 - Timber Tax Program	0	1	1	1	1	1
0570100 - Sales and Use Tax Program	0	14,417	12,575	12,465	10,832	9,144
0570125 - Hazardous Substances Tax Program	0	27	24	24	20	17
0570150 - Alcoholic Beverage Tax Program	0	108	94	94	80	69
0570175 - Tire Recycling Fee Program	0	15	13	13	11	10
0570200 - Cigarette and Tobacco Products Tax Program	0	313	272	270	230	198
0570225 - Cigarette and Tobacco Products Licensing Program	0	1	1	1	1	0
0570250 - Transportation Fund Tax Program	0	1,909	1,665	1,851	1,408	1,211
0570275 - Occupational Lead Poisoning Prevention Fee Program	0	1	1	1	1	1
0570300 - Integrated Waste Management Program	0	14	12	12	10	9
0570325 - Underground Storage Tank Fee Program	0	96	84	83	71	61
0570350 - Oil Spill Prevention Program	0	9	8	7	6	6
0570375 - Energy Resources Surcharge Program	0	19	17	16	14	12
0570400 - Annual Water Rights Fee Program	0	2	2	2	2	1
0570425 - Childhood Lead Poisoning Prevention Fee Program	0	7	6	6	5	4
0570450 - Marine Invasive Species Program	0	1	1	1	1	1
0570500 - Emergency Telephone Users Surcharge Program	0	32	28	28	24	20
0570525 - E-Waste Recycling Fee Program	0	58	50	50	42	37
0570600 - Natural Gas Surcharge Program	0	175	153	152	129	111
Total All Programs	\$0	\$17,609	\$15,273	\$16,140	\$12,912	\$11,106

Analysis of Problem

BCP Title: CROS Project Implementation Phase

DP Name: 0860-400-BCP-DP-2016-MR

Personal Services Details

Positions	Salary Information			CY	BY	BY+1	BY+2	BY+3	BY+4
	Min	Mid	Max						
1139 - Office Techn (Typing)				0.0	1.0	1.0	1.0	1.0	1.0
1312 - Staff Info Sys Analyst (Spec)				0.0	3.0	3.0	3.0	3.0	3.0
1312 - Staff Info Sys Analyst (Spec) (Eff. 01-01-2017)				0.0	0.5	1.0	1.0	1.0	1.0
1337 - Sr Info Sys Analyst (Spec)				0.0	4.0	4.0	4.0	4.0	4.0
1340 - Sr Info Sys Analyst (Supvr)				0.0	1.0	1.0	1.0	1.0	1.0
1373 - Sys Software Spec II (Tech)				0.0	8.0	8.0	8.0	8.0	8.0
1373 - Sys Software Spec II (Tech) (Eff. 01-01-2017)				0.0	0.5	1.0	1.0	1.0	1.0
1384 - Dp Mgr II				0.0	1.0	1.0	1.0	1.0	1.0
1587 - Sys Software Spec I (Tech)				0.0	1.0	1.0	1.0	1.0	1.0
4331 - Bus Taxes Administrator II				0.0	1.0	1.0	1.0	1.0	1.0
4379 - Bus Taxes Spec II				0.0	1.0	1.0	1.0	1.0	1.0
4379 - Bus Taxes Spec II (Eff. 01-01-2017)				0.0	0.5	1.0	1.0	1.0	1.0
OT00 - Overtime				0.0	0.0	0.0	0.0	0.0	0.0
TH00 - Temporary Help				0.0	20.6	20.6	20.6	20.6	16.7
VR00 - Various				0.0	0.0	0.0	0.0	0.0	0.0
Total Positions				0.0	43.1	44.6	44.6	44.6	40.7

	CY	BY	BY+1	BY+2	BY+3	BY+4
Salaries and Wages						
1139 - Office Techn (Typing)	0	38	38	38	38	38
1312 - Staff Info Sys Analyst (Spec)	0	221	221	221	221	221
1312 - Staff Info Sys Analyst (Spec) (Eff. 01-01-2017)	0	37	73	73	73	73
1337 - Sr Info Sys Analyst (Spec)	0	323	323	323	323	323
1340 - Sr Info Sys Analyst (Supvr)	0	85	85	85	85	85
1373 - Sys Software Spec II (Tech)	0	646	646	646	646	646
1373 - Sys Software Spec II (Tech) (Eff. 01-01-2017)	0	40	81	81	81	81
1384 - Dp Mgr II	0	85	85	85	85	85
1587 - Sys Software Spec I (Tech)	0	73	73	73	73	73
4331 - Bus Taxes Administrator II	0	85	85	85	85	85
4379 - Bus Taxes Spec II	0	81	81	81	81	81
4379 - Bus Taxes Spec II (Eff. 01-01-2017)	0	41	81	81	81	81
OT00 - Overtime	0	2,166	2,166	2,137	2,133	2,087
TH00 - Temporary Help	0	1,518	1,518	1,518	1,518	1,210
VR00 - Various	0	312	312	312	312	312
Total Salaries and Wages	\$0	\$6,751	\$6,868	\$6,839	\$6,835	\$6,481

	CY	BY	BY+1	BY+2	BY+3	BY+4
Staff Benefits						
5150200 - Disability Leave - Industrial	0	3	3	3	3	3
5150210 - Disability Leave - Nonindustrial	0	2	2	2	2	2
5150350 - Health Insurance	0	570	589	589	588	539
5150500 - OASDI	0	440	448	447	446	419
5150630 - Retirement - Public Employees - Miscellaneous	0	735	759	759	760	696
5150700 - Unemployment Insurance	0	3	3	3	3	3
5150750 - Vision Care	0	11	11	11	11	10
5150800 - Workers' Compensation	0	32	34	34	34	31
Total Staff Benefits	\$0	\$1,796	\$1,849	\$1,848	\$1,847	\$1,703
Total Personal Services	\$0	\$7,547	\$7,717	\$7,687	\$7,682	\$7,184

1. Justification

The Board of Equalization (BOE) requests \$17.5 million and 43.1 positions (22.5 positions and 20.6 temporary help) in Fiscal Year (FY) 2016-17, to ensure that the Centralized Revenue Opportunity System (CROS) Project has the resources required to begin the Implementation Phase.

Phase	BOE Responsibilities	Q3 16			Q4 16			Q1 17			Q2 17		
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Implementation Readiness	Prepare BOE for the start of the implementation based upon selected contract												
Initial Release: Revenue Generation	BOE will support the contractor in the installation, configuration and implementation of a revenue generation strategy												
Major Release #1: EDW/BI	BOE will support the contractor in the installation, configuration and implementation of a data warehouse and key performance indicators												
Major Release #2: Tax Programs	BOE will participate in the planning and initiation phase of the tax program implementation (this phase continues in the next fiscal year)												

1.1 Resource Plans for FY 16-17

The resources required to support implementation activities are based upon the BOE's roles and responsibilities as defined in the RFP. Based upon an October 2016 start date and the Integrated Master Schedule, the project planned for four phases during FY 16/17.

1.2 Implementation Readiness – Jul 2016 to Nov 2016

The Implementation Readiness phase will focus on the activities needed to prepare the BOE for the onboarding of the selected contractor. The following deliverables will be produced during this phase of the project:

<i>Implementation Readiness Phase</i>	Q3 16			Q4 16	
	Jul	Aug	Sep	Oct	Nov
Business Analysis Team					
Procedural Data Quality Rules Documentation					
New Legislation Analysis and Updated Requirement Artifacts					
SME Readiness and Training Materials and Classes					
Gap Analysis – BOE readiness					
Data Conversion Readiness Team					
IRIS Extract and Updated Data Quality Rule Results					
Data Quality Analysis					
Prepare Staging Environment					
CROS Infrastructure Support (CROS IT Ops) Team					
Ongoing support for CROS Infrastructure					
Project Management Office Team					
Project Management Support					
SharePoint Process Improvements and Vendor Support					
Project Reporting Metrics					
Resource Planning					
Facilities Mods					
SI Onboarding					
Deliverable Management Prep and Training					
Skills & Implementation Readiness Gap Analysis					
Interfaces Team					
Interface Data Flows					
Updated Data Exchanges					
Automate Interfaces					
Organizational Change Management					
Establish Core OCM Team					
Conduct Readiness Assessment					
Vision the Future					
Prepare a CROS Orientation					
Supervisor Coaching Plan					

Business Analysis – During implementation readiness, data analysis activities will focus on:

- ♦ Procedural Data Quality Rules Documentation - Support the data cleansing and readiness efforts by defining procedural quality rules and documenting them in the CROS conversion management tool.
- ♦ New legislation analysis and updated requirement artifacts – Review and assess the impact to the functional requirements, business rules, forms and reports for new legislation for all the functions within the scope of CROS. The Mobile Telephony Surcharge (MTS) Project Phase II will be done this year.
- ♦ SME Readiness training materials and classes – Prepare material for and conduct training for the BOE subject matter experts that will be participating in the requirements analysis and design sessions.

Data Conversion Support – This team has developed a data dictionary for the legacy systems within the scope of CROS and is currently conducting data cleansing activities of the legacy data and will continue to conduct these ongoing activities during implementation readiness. In addition to data cleansing activities, this team will:

- ♦ (Full) IRIS extract and updated data quality rule results – A full extract of the IRIS legacy system will be generated and the data quality errors that have been fixed will be assessed to determine improvements in the data quality.
- ♦ Data Quality Analysis - Continue to plan for and remediate data issues, including such issues as invalid addresses, “orphan records”.
- ♦ Prepare staging environment – Continue to prepare and test the integrity of the environment the data will be converted from to the new system and the automated data purge/archive rules.

Integration Support – This team is responsible for identifying and cataloging data exchanges (interfaces) with external entities. The project has automated about 30 interfaces using a tool called ePi. A contract resource supports ePi and provides advice on data integration issues. During implementation readiness this team will continue to work on the following deliverables:

- ♦ Interface Data Flows – Conduct analysis to define and document the processes that currently support incoming or outgoing data integration/exchanges with external agencies. There are approximately 167 (cataloged) interfaces within the scope of CROS.
- ♦ Automated interfaces – Automate data exchange interfaces using ePi.
- ♦ Updated data exchange formats – Work with other agencies to migrate data exchanges to newer technologies and interface methods.

CROS Infrastructure Support (CROS IT Ops) – This team supports the hardware and software infrastructure that supports the CROS data cleansing and staging environments, the external data exchanges using ePi, as well as the tools that form the repository for project requirement artifacts such as business requirements, business rules, data quality rules, procedural quality rules, data dictionary, interface catalog.

Organizational Change Management – This team will be working with the key stakeholders and end users to ensure that after system implementation, there will be buy-in and use of the new solution.

During implementation readiness, this function will:

- ♦ Establish OCM Core Team – Work throughout BOE to identify and train a team of change agents who will help define and deliver change activities and interventions. The project assumes BOE will redirect these resources.
- ♦ Conduct Readiness Assessment – This deliverable will assess BOE's readiness to accept and use the new solution. OCM activities will be developed from the information gleaned in the assessment.

This team is requesting additional resources to assist with the following new activities:

- ♦ Vision the future – These activities help BOE stakeholders and end users to begin to visualize how their work may change. The vision is based on many of the objectives in the FSR. For example, the OCM Team will work with BOE Supervisors to envision how the work would occur if BOE collectors have the ability (with the new solution) to work remotely instead of coming to an office to file/complete paperwork.
- ♦ Prepare for a CROS Orientation – Prepare for and deliver an orientation about BOE's readiness to the new contractor.
- ♦ Supervisor Coaching Plan – This plan will provide information for BOE supervisors to communicate the changes coming with the new solution to their employees. For example, the plan will contain techniques for dealing with resistance and will aid in planning communication and activities for achieve buy-in and acceptance.

PMO – This team consists of State resources and a consultant project manager. In addition to these ongoing responsibilities, this team will deliver the following activities/deliverables:

- ♦ Project Management Support – The PMO team is responsible for planning, executing, and controlling ongoing project management activities for the CROS project, including the management of the project schedule, risks/issues, scope, cost, contracts, resources, stakeholders, and project status reports.
- ♦ SharePoint process improvements and vendor support – Review and streamline existing SharePoint processes related to: CROS document management, SharePoint access management, content management, and change management. Work with the selected contractor to design and set up SharePoint sites and lists, and deliver status reports using SharePoint.
- ♦ Project Reporting Metrics – Define and establish dashboard reports for key project metrics.
- ♦ Resource Planning – Based upon the selected contractor's schedule, plan and prepare for the next BCP/SPR4.
- ♦ Skills and Implementation Readiness Gap Assessment - The PMO is responsible for facilitating an analysis of the winning bidder's proposal and the BOE's as-is environment, which will identify gaps and be used in planning for SPR4 and the next BCP.

- ♦ Compensation Management Prep – Update the Compensation Management plan to address the final contract.
- ♦ Facilities Planning – Work with the Admin Division to ensure space and conference rooms for the CROS and vendor teams – up to 120 resources.
- ♦ SI Onboarding – Facilitate the efficient processing of up to 50 contracted resources to start the implementation. Onboarding requires the PMO to work with other divisions in BOE to ensure security requirements and clearances are met, PCs are configured, and role-based applications installed, contractors receive BOE required training.

In addition to work already underway, the project is asking for new resources to support the following project activities/deliverables:

- ♦ Deliverable Management Prep & Training – The PMO will be responsible for receiving and tracking deliverables received from the contractor. The project will redirect an existing resource to manage this work, but one Office Tech resource is being requested to handle the administrative and documentation activities supporting deliverable management. The project plans to bring this resource onboard in early FY 16/17 to learn the processes and tool the PMO has developed to manage the deliverables, assist in the creation of training materials for the BOE deliverable reviewers and the contract resources involved in the deliverable review process.
- ♦ Schedule Management – The project is requesting an additional resource to assist the existing scheduler to manage the planning, execution, and tracking of new activities being driven by the selected contractor's approach and schedule, as well as the integration of the State and contractor's schedule and activities and TSD's schedule and activities related to tracking changes to BOE Legacy systems.

1.3 Initial Release: Revenue Generation - Oct 2016 to Apr 2017

As a revenue generation phase, the contractor will utilize current BOE policy and processes and introduce new strategies to increase revenue to the agency from existing systems. The contractor will install, configure, and implement the revenue generation strategy with assistance from BOE.

To support this release, CROS plans to utilize current CROS resources for business analysis and organizational change management as well as subject matter experts (SMEs) from BOE tax policy unit, and audit and collections to advise on potential changes and their impacts. They will participate in the following activities:

Initial Release: Revenue Generation	Q4 16			Q1 17		
	Oct	Nov	Dec	Jan	Feb	Mar
Project Management – Planning and Initiation						
Release Scope Defined - (Process, Policy, Data Conversion, Interfaces)						
Planning - (Develop Schedule, Plan Resource Needs, Plan Reporting, Plan Quality Activities)						
Requirements Analysis						
Impact Assessment - (Policy, Process, Business Requirements, Interfaces to 3rd Party Data)						
Board Member Approval of Policy Changes						
Design						
Logical Design - (Includes Security, Interfaces Design, BOE Forms and Reports)						
Physical Design - (Organization Policy and Process Changes)						
MOU/IAA						
Development						
Solution Developed - (Includes Interfaces, Updates to BOE Forms and Reports)						
Solution Tested - (System and Performance Test)						
Data Conversion						
Testing						
User Acceptance Test Completed - (Includes Changes to Organization Policies Processes, Forms, Reports and Modified Interfaces)						
Training						
Stakeholders Trained						
Deployment						
Changed Validated						
Release Management						
Management Required Deliverables (MRDs) Reviews						
Global and Release MRDs Acceptances						
Organizational Change Management						
Planning Stage						
Implement Change						
Reinforce Change						
Project Management						

Planning and Initiation – This phase of the project will scope the initial release. CROS team members from the PMO, Business analysis, UAT, Data Conversion, Support, Integration Support, and SME's from the BOE Data Analysis unit, tax policy division, legacy programming unit, call center representatives may be called to participate in this phase. The planning effort will produce the following deliverables:

- ♦ **Release scope defined** – The scope of the initial release will be defined. The scope includes the processes, (potential) policies, data sources, (potential) interfaces that will be affected in this release.

- ♦ Planning – This deliverable will establish the schedule, resources needs, reporting metrics, quality activities, and internal and external communications etc. for the initial release. The PMO will facilitate this process and include resources from Business Analysis, UAT, Data Conversion, Support, Integration Support and SME's from the BOE Data Analysis unit, tax policy division, and legacy programming unit in these activities.

Requirements Analysis – During this phase of the project the team members will be analyzing, documenting, and validating the requirements related to the revenue generation activities. The requirements analysis effort will produce the following deliverables:

- ♦ Impact Assessment – During impact assessment, CROS team members and SMEs will advise the contractor on their proposed strategy for collections and audit cases affecting BOE business rule and policies; this deliverable documents the impact to the BOE processes, policies, business requirements, interfaces to 3rd party data, MOU/IAA to support new interfaces, and changes to BOE's legacy systems.
- ♦ Board Member Approval of Policy Changes – These tasks will be conducted by the BOE Tax Policy Division SMEs and will facilitate the approvals of any changes to BOE policies that are affected by this release.

Design – During this phase the project team members will be supporting the contractor's design of the revenue generation processes. Deliverables from this phase include:

- ♦ Logical Design – This activity includes a logical design of the revenue generation solution. BOE will be responsible for assessing information security, designs for data integration with external data sources, modifications to BOE's audit and collection forms.
- ♦ Physical Design – This activity includes the delivery of revised policies, process, forms and report changes.
- ♦ MOU/IAA – SMEs will assist Integration support in developing and facilitating the approval of MOU/IAs that support new 3rd party data sources required by the revenue generation solution.

Development – During this phase the project team members will support the contractor's development of the revenue generating solution.

- ♦ Solution developed – During this activity BOE will support the development of the revenue generation solution including interfaces, updates to of revised policies, process, forms and report changes. Team members and SMEs will assist the contractor with requested changes to revenue reporting.
- ♦ Solution tested – The CROS technical testing support team will support system and performance testing. The Compensation Model analyst and SMEs from the Data Analysis unit will validate revenue calculations if necessary.
- ♦ Data conversion - Team members and SMEs will assist the contractor with requested changes during data conversion.

Testing – During this phase of the project, team members and subject matter experts will be involved in testing changes or new components of the revenue generation solution.

- ♦ User Acceptance Test completed – BOE is responsible for testing any potential changes to legacy systems, organizational policies, processes, forms and reports.

Training – During this phase of the project, CROS team members will train BOE staff who are affected by the changes in policies, processes, forms, etc.

- ♦ Stakeholders Trained – This deliverable will ensure stakeholders are trained regarding the process and policy changes. CROS training team members and SMEs will provide the training. Call Center Representatives will be informed regarding policy changes to handle any potential taxpayer inquiries.

Deployment – During the phase, the project will support the deployment of the revenue generation solution.

- ♦ Changes Validated – This deliverable validates all proposed changes have been implemented and are being utilized/followed.
- ♦ Release Management – This deliverable closes out the release and ensures all changes have been documented and communicated.

MRD Reviews – This set of activities occurs throughout every release and covers the deliverables that will be submitted by the contractor. Dedicated deliverable reviewers will be comprised of CROS team members and SMEs from the program and technology units as well as the call center.

- ♦ Global and Release MRDs acceptance - The project assumes approximately 18 deliverables submitted in the Initial Release.

Organizational Change Management – OCM activities focus on ensure the stakeholders and end users understand the changes coming and the changes to their processes/work. CROS team members will conduct OCM activities with SMEs from BOE units involved in the release.

- ♦ **Planning** - These activities will define the scope of the changes coming for the release, the stakeholders involved in the change, and OCM activities and timelines.
- ♦ **Changes Implemented** – This phase executes the communications, sponsor, and coaching plans defined in the planning activity.
- ♦ **Reinforce Change** – These activities address specific concerns (resistance) to change. The interventions are targeted and the team members involved in the interventions varies depending on where in the organization the issue occurs.

Project Management – Ongoing planning, initiating, executing, monitoring, controlling and closing of project management activities.

1.4 Major Release 1 and Major Release 2 – April 2017 to June 2017

At this time, BOE intends to begin Major Release 1 and Major Release 2 concurrently without over burdening agency resources.

1.4.1 Major Release 1

BOE will support the contractor in the installation, configuration and implementation of an enterprise data warehouse (EDW), business intelligence (BI) and key performance indicators. In this release, the contractor will convert data to an EDW, and complete external interfaces.

<i>Major Release 1: EDW/BI</i>	Q2 17	
	May	Jun
Project Management – Planning and Initiation		
Scope Validation - (BI Data Sources, KPI, Environment Readiness, Interfaces and Affected MOUs)		
Planning- (Release Schedule, Resource Needs, Communications, Quality Activities, Logistics)		
Management Required Deliverables (MRDs) Review		
Global and Release MRDs Acceptances		
Organizational Change Management		
Project Management		

Planning and Initiation – This phase of the project will define the scope of the initial release. CROS team members from the PMO, business analysis, technical management, data conversion support, integration support, BOE infrastructure support teams, and SME's from the BOE Data Analysis, legal, and technology data warehouse unit will be participating in this release. The planning effort will produce the following deliverables:

- ♦ Release scope defined – The scope of the initial release will be defined. The scope includes the key performance indicators, data sources, interfaces that will be affected in this release.
- ♦ Planning – This deliverable will establish the schedule, resources needs, reporting metrics, quality activities, and internal and external communications etc. for the initial release. The PMO will facilitate this process and include resources from the CROS teams and SME's from the BOE Data Analysis unit, legal, and database and data warehouse units in these activities.

Management Required Deliverables (MRD) Reviews – This set of activities occurs throughout every release and covers the deliverables that will be submitted by the contractor. Dedicated deliverable reviewers will be comprised of CROS team members and SMEs from the program and technology units as well as the call center.

- ♦ Global and Release MRDs acceptance - The project assumed approximately 20 deliverables submitted in the first two months of this release.

Project Management – Ongoing planning, initiating, executing, monitoring, controlling and closing of project management activities.

1.5 Major Release 2

BOE will participate in the planning and initiation phase of the tax program implementation (this phase continues in the next fiscal year). All BOE tax programs will be fully engaged in this release including revenue accounting resources. In addition, the integration of call center technology and enterprise data content management will be completed. BOE's TSD will also prepare for the technical implementation of the solution.

Major Release 2: Tax Programs	Q2 17	
	May	Jun
Project Management – Planning and Initiation		
Scope Validation - (BI Data Sources, KPI, Environment Readiness, Interfaces and Affected MOUs)		
Planning - (Release Schedule , Resource Needs , Communications Quality Activities, Logistics)		
Management Required Deliverables (MRDs) Review		
Global and Release MRDs Acceptances		
Organizational Change Management		
Project Management		

Planning and Initiation – This phase of the project will define the scope of the initial release. CROS team members from the PMO, business analysis, technical management, data conversion support, integration support, BOE infrastructure support teams, and SME's from all tax programs and functions within the scope of CROS, field operations, legal units will be participating in this release. The planning effort will produce the following deliverables:

- ♦ Release scope defined – The scope of the initial release will be defined. The scope includes the requirements, business rules, processes, forms, reports, data sources that will be affected in this release.
- ♦ Planning – This deliverable will establish the schedule, resource needs, reporting metrics, quality activities, and internal and external communications for the initial release. The PMO will facilitate this process and include resources from the CROS teams and SME's from the BOE Data Analysis unit, legal, and database and data warehouse units in these activities.

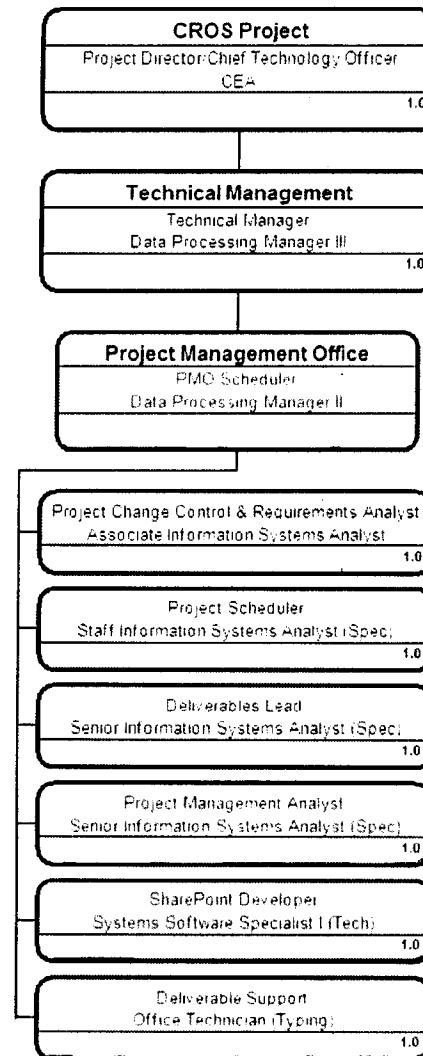
Management Required Deliverables (MRD) Reviews – This set of activities occurs throughout every release and covers the deliverables that will be submitted by the contractor. Dedicated deliverable reviewers will be comprised of CROS team members and SMEs from the program and technology units as well as the call center.

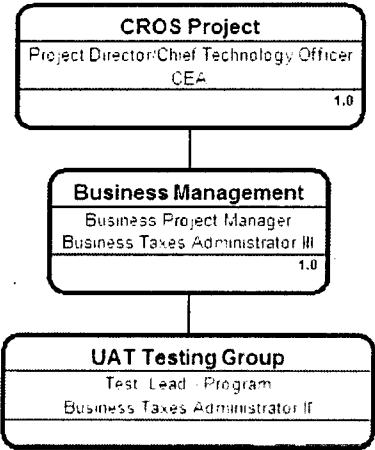
- ♦ Global and Release MRDs acceptance - The project assumed approximately 20 deliverables submitted in the first two months of this release.

Project Management – Ongoing planning, initiating, executing, monitoring, controlling and closing of project management activities.

**Proposed Organizational Chart
PMO Scheduler
FY 16-17**

**Proposed FY 16/17
New Position**



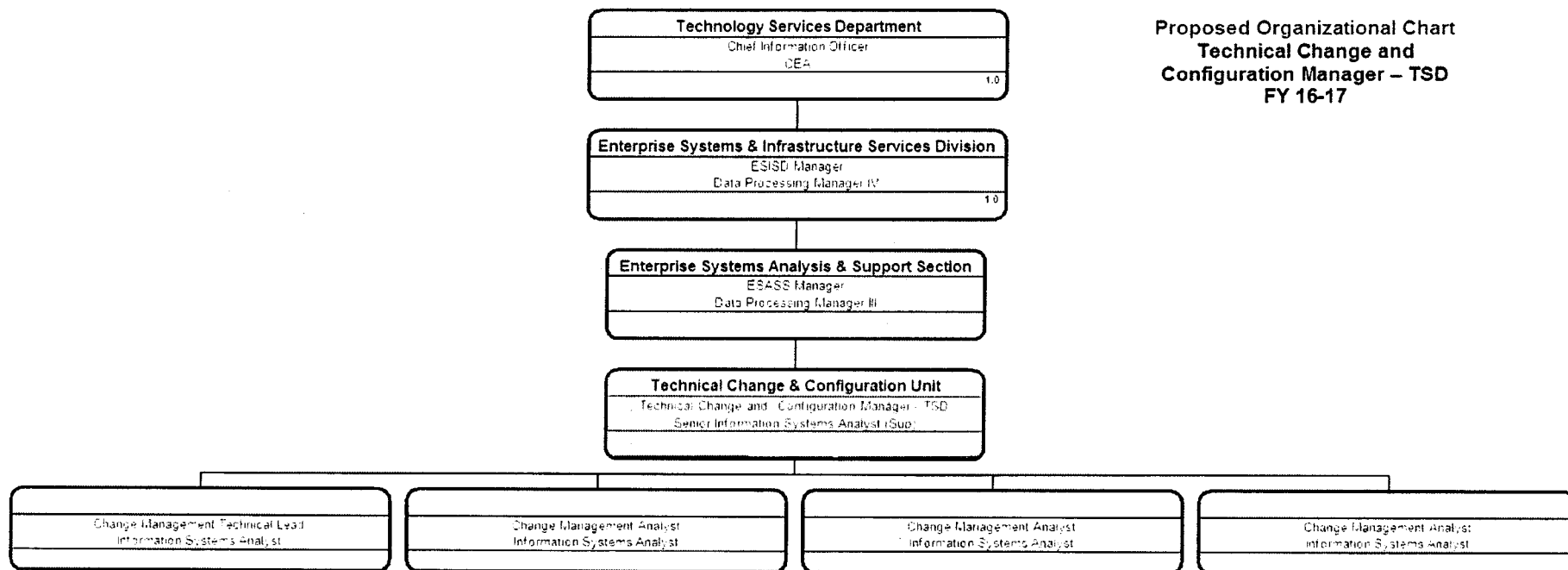


Proposed Organizational Chart
Test Lead - Program
FY 16-17

Proposed FY 16 17
New Position

Note: The Test Lead- Program will provide supervision to 18 UAT Testers throughout the BOE in FY 17-18.

**Proposed Organizational Chart
Technical Change and
Configuration Manager – TSD
FY 16-17**



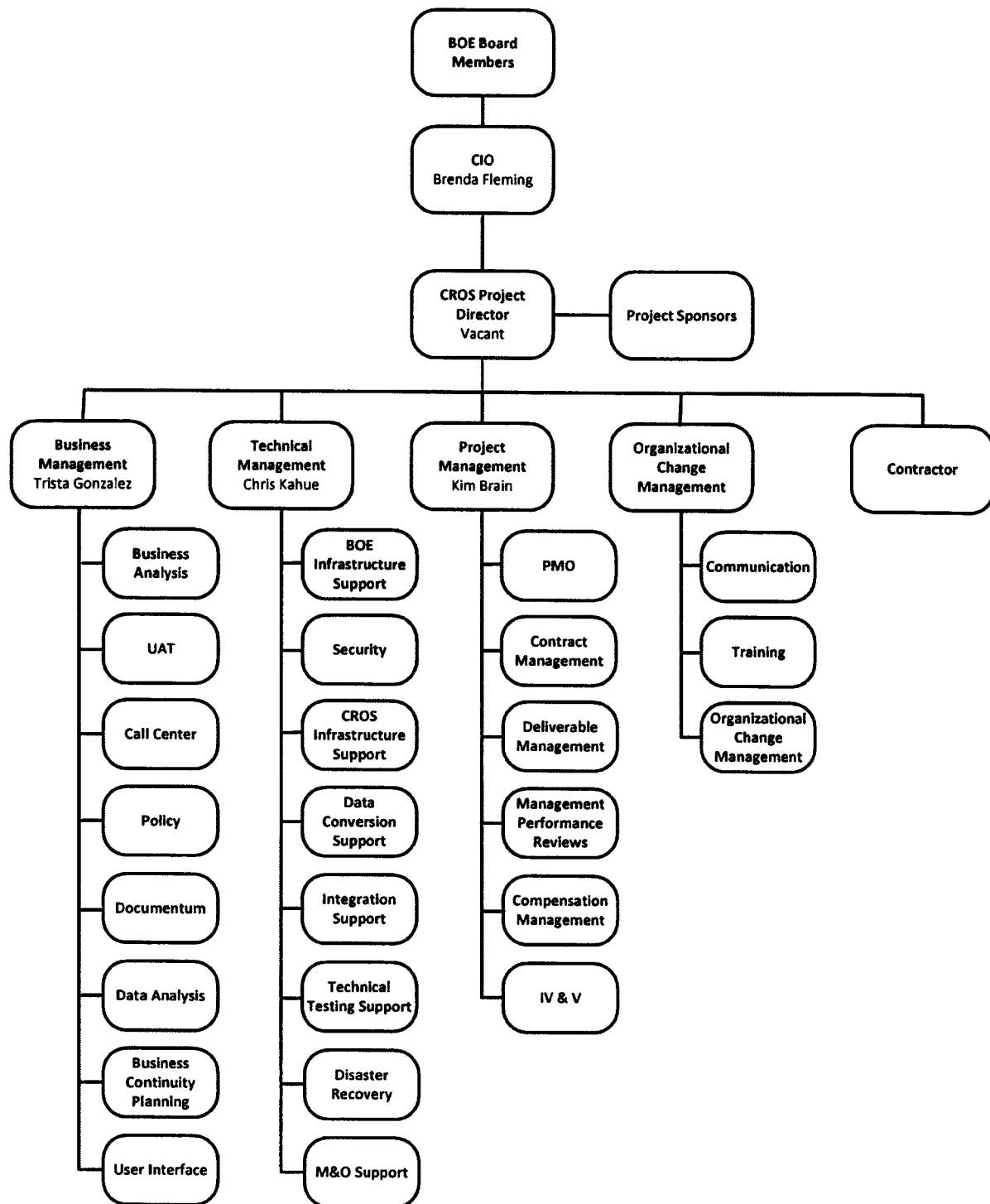
Proposed FY 16-17
New Position

	Established Class	Position Number	Original Monthly Salary	Original Annual Salary	Current Class	Position Number	Current Monthly Salary	Current Annual Salary	Difference (Orig vs. Current)
1	AGPA	487-5393-001	\$ 5,180	\$ 62,160	SSS III (T)	487-1367-001	\$ 7,392	\$ 88,704	\$ 26,544
2	APA (Spec)	487-1579-009	\$ 5,590	\$ 67,080	SSS II (T)	487-1373-018	\$ 6,729	\$ 80,748	\$ 13,668
3	ATA	487-4281-003	\$ 5,590	\$ 67,080	BTS I	487-4380-025	\$ 6,272	\$ 75,264	\$ 8,184
4	ATA	487-4281-006	\$ 5,590	\$ 67,080	Staff ISA (Spec)	487-1312-009	\$ 6,129	\$ 73,548	\$ 6,468
5	ATA	487-4281-008	\$ 5,590	\$ 67,080	Staff ISA (Spec)	487-1312-010	\$ 6,129	\$ 73,548	\$ 6,468
6	BTCS	487-8694-006	\$ 5,438	\$ 65,256	BTS I	487-4380-027	\$ 6,272	\$ 75,264	\$ 10,008
7	BTCS	487-8694-004	\$ 5,438	\$ 65,256	BTS I	487-4380-024	\$ 6,272	\$ 75,264	\$ 10,008
8	BTCS	487-8694-008	\$ 5,438	\$ 65,256	BTS I	487-4380-029	\$ 6,272	\$ 75,264	\$ 10,008
9	BTCS	487-8694-003	\$ 5,438	\$ 65,256	BTS I	487-4380-023	\$ 6,272	\$ 75,264	\$ 10,008
10	BTCS	487-8694-005	\$ 5,438	\$ 65,256	SR ISA (Spec)	487-1337-012	\$ 6,740	\$ 80,880	\$ 15,624
11	BTCS	487-8694-007	\$ 5,438	\$ 65,256	SSM I	487-4800-002	\$ 5,954	\$ 71,448	\$ 6,192
12	BTR	487-8690-005	\$ 4,138	\$ 49,656	AGPA	487-5393-003	\$ 5,180	\$ 62,160	\$ 12,504
13	BTR	487-8690-006	\$ 4,138	\$ 49,656	BTS II	487-4379-013	\$ 6,743	\$ 80,916	\$ 31,260
14	BTS I	487-4380-018	\$ 6,272	\$ 75,264	BTA III	301-4320-001	\$ 8,542	\$ 102,504	\$ 27,240
15	BTS I	487-4380-015	\$ 6,272	\$ 75,264	BTS II	487-4379-017	\$ 6,743	\$ 80,916	\$ 5,652
16	BTS I	487-4380-017	\$ 6,272	\$ 75,264	BTS II	487-4379-011	\$ 6,743	\$ 80,916	\$ 5,652
17	BTS I	487-4380-016	\$ 6,272	\$ 75,264	BTS II	487-4379-012	\$ 6,743	\$ 80,916	\$ 5,652
18	BTS I	487-4380-019	\$ 6,272	\$ 75,264	BTS II	487-4379-007	\$ 6,743	\$ 80,916	\$ 5,652
19	SSS II (T)	487-1373-001	\$ 6,729	\$ 80,748	BTS II	487-4379-001	\$ 6,743	\$ 80,916	\$ 168
20	BTS I	487-4380-001	\$ 6,272	\$ 75,264	BTS II	487-4379-018	\$ 6,743	\$ 80,916	\$ 5,652
21	BTS I	487-4380-004	\$ 6,272	\$ 75,264	SSM II	487-4801-002	\$ 6,537	\$ 78,444	\$ 3,180
22	SSS II (T)	487-1373-014	\$ 6,729	\$ 80,748	SR PA	487-1583-005	\$ 6,740	\$ 80,880	\$ 132
23	SSS II (T)	487-1373-010	\$ 6,729	\$ 80,748	SR PA	487-1583-010	\$ 6,740	\$ 80,880	\$ 132
24	SSS II (T)	487-1373-016	\$ 6,729	\$ 80,748	SR PA	487-1583-007	\$ 6,740	\$ 80,880	\$ 132
25	SSS II (T)	487-1373-012	\$ 6,729	\$ 80,748	SR PA	487-1583-008	\$ 6,740	\$ 80,880	\$ 132
26	SSS II (T)	487-1373-011	\$ 6,729	\$ 80,748	SSS III (Sup)	487-1559-003	\$ 7,763	\$ 93,156	\$ 12,408
27	Staff ISA	487-1312-001	\$ 6,129	\$ 73,548	SR ISA (Spec)	487-1337-001	\$ 6,740	\$ 80,880	\$ 7,332
28	SSS II (T)	487-1373-001	\$ 6,729	\$ 80,748	SSS III (T)	487-1367-008	\$ 7,392	\$ 88,704	\$ 7,956
29	BTS I	487-4380-001	\$ 6,272	\$ 75,264	BTS II	487-4379-001	\$ 6,743	\$ 80,916	\$ 5,652
30	TA	487-4267-002	\$ 4,264	\$ 51,168	BTS I	487-4380-002	\$ 6,272	\$ 75,264	\$ 24,096
31	TA	487-4267-001	\$ 4,264	\$ 51,168	BTS I	487-4380-001	\$ 6,272	\$ 75,264	\$ 24,096
32	SSS III (T)	487-1367-001	\$ 7,392	\$ 88,704	SSS III (Sup)	487-1559-001	\$ 7,763	\$ 93,156	\$ 4,452
				\$ 2,253,264					\$ 2,565,576
									\$ 312,312

*Mid-Step salary figures

*Original salary adjusted for 4.5% increases due to bargaining unit agreements since establishment

*Classification adjustment activity up to November 2015



Role Name	Function	Functional Team	BOE Department	Ind per Role (NOT SAME AS PYS)	Preferred Classification	CROS Existing	New Perm	Temp Help	Overtime	SFLYr
Data Quality Coordinator	Data Conversion Support	Technical Management	Executive Office	1	Sr. ISA	1.0				12-13
Access Control - Technical Oversight	Security	Technical Management	Administration Department	1	SSS II (T)		1.0			16-17
Access Control Analyst (former Access)	Security	Technical Management	Administration Department	1	Sr. ISA		1.0			16-17
Accounting SME	Business Analysis	Business Management	Administration Department	1	Accounting Administrator II			328.8		16-17
Budget Branch SME	Business Analysis	Business Management	Administration Department	1	AGPA				76.0	16-17
Business Policy Liaison SME - Accounting	Policy	Business Management	Administration Department	1	Accounting Administrator II			171.0		16-17
Communications Publications Support -	Communication	Organizational Change	Administration Department	1	ATSS				159.6	16-17
Financial Management Division SME (former	Business Management	Business Management	Administration Department	1	AGPA				450.0	16-17
Form Developer - Forms and Pubs	Communication	Organizational Change	Administration Department	1	AGPA				1215.0	16-17
Forms and Publications SME (formerly	Communication	Organizational Change	Administration Department	1	Tax Service Specialist			675.0		16-17
Graphic Designer	Communication	Organizational Change Management	Administration Department	1	Graphic Designer III				252.0	16-17
Information Security Officer	New System Infrastructure Support	Technical Management	Administration Department	1	Staff ISA (Spec)				303.8	16-17
Infrastructure Support ISO	New System Infrastructure Support	Technical Management	Administration Department	1	Sr. ISA			1350.0		16-17
Proof Reader	Communication	Organizational Change Management	Administration Department	1	AGPA				1350.0	16-17
Report Developer - Accounting	Business Analysis	Business Management	Administration Department	1	SSS II (T)			225.0		16-17
Revenue Accounting SME - Accounting	Business Analysis	Business Management	Administration Department	1	Accounting Administrator I				76.0	16-17
Security Tester	Security	Technical Management	Administration Department	1	Staff ISA (Spec)				303.8	16-17
Admin Analyst - Cost/Contract	Project Management	PMO	Executive Office	1	AGPA	1.0				12-13
Admin Analyst - HR	Project Management	PMO	Executive Office	1	AGPA	1.0				12-13
Admin Support Lead	Project Management	PMO	Executive Office	1	SSM II	1.0				12-13
Appeals Lead	Business Analysis	Business Management	Executive Office	1	BTS II	1.0				12-13
Application Developer I	Integration Support	Technical Management	Executive Office	1	SSS I (T)	1.0				12-13
Application Developer II	Integration Support	Technical Management	Executive Office	1	SSS II (T)	1.0				12-13
Application Developer III	Integration Support	Technical Management	Executive Office	1	SSS III (T)	1.0				12-13
Audits Lead	Business Analysis	Business Management	Executive Office	1	BTS II	1.0				12-13
BAT Support (formerly Student Assistant)	Business Analysis	Business Management	Executive Office	1	Student Assistant	0.0				12-13
Business Analysis Lead	Business Analysis	Business Management	Executive Office	1	SSM III	1.0				12-13
Business Analyst - Appeals	Business Analysis	Business Management	Executive Office	2	BTS I	2.0				12-13
Business Analyst - Collections	Business Analysis	Business Management	Executive Office	2	BTS I	2.0				12-13
Business Analyst- Audits	Business Analysis	Business Management	Executive Office	2	BTS I	2.0				12-13
Business Analyst- Cashiers	Business Analysis	Business Management	Executive Office	2	BTS I	2.0				12-13
Business Analyst- Refunds	Business Analysis	Business Management	Executive Office	2	BTS I	2.0				12-13
Business Analyst- Registration	Business Analysis	Business Management	Executive Office	2	BTS I	2.0				12-13
Business Analyst- Reporting Obligations	Business Analysis	Business Management	Executive Office	2	BTS I	2.0				12-13
Business Project Manager (former Business Manager)	Management	Management Team	Executive Office	1	BTA III	1.0				12-13
Cashiers Lead	Business Analysis	Business Management	Executive Office	1	BTS II	1.0				12-13
Chief Technology Officer	Management	Management Team	Executive Office	1	CEA	1.0				12-13
Clerical- Admin Support	Project Management	PMO	Executive Office	1	OT	1.0				12-13
Clerical- Admin Support	Project Management	PMO	Executive Office	1	OT	1.0				12-13
Collections Lead	Business Analysis	Business Management	Executive Office	1	BTS II	1.0				12-13
Compensation Model Lead	Compensation Management	PMO	Executive Office	1	BTS II	1.0				12-13

Role Name	Function	Functional Team	BOE Department	Ind per Role (NOT SAME AS PYS)	Preferred Classification	CROS Existing	New Perm	Temp Help	Overtime	SFL yr
Data Analysis SME - Research and Stats	Data Analysis	Business Management	Executive Office	1	Research Program Specialist I				607.5	16-17
Data Conversion Lead	Data Conversion Support	Technical Management	Executive Office	1	SSS III (S)	1.0				12-13
Data Quality Coordinator	Data Conversion Support	Technical Management	Executive Office	1	Sr. ISA	1.0				12-13
Data Quality Coordinator	Data Conversion Support	Technical Management	Executive Office	1	Sr. ISA	1.0				12-13
Database Administrator/Infrastructure Support (formerly Database Administrator)	New System Infrastructure Support	Technical Management	Executive Office	1	SSS II (T)	1.0				12-13
Deliverable Lead	Deliverable Management	PMO	Executive Office	1	Sr. ISA	1.0				12-13
Deliverable Support (formerly Clerical - Deliverable Support)	Deliverable Management	PMO	Executive Office	1	OT		1.0			16-17
Developer	New System Infrastructure	Technical Management	Executive Office	1	SSS II (T)	1.0				12-13
ePI Admin & Interfaces Developer	Integration Support	Technical Management	Executive Office	1	Associate ISA	1.0				12-13
Infrastructure Support Programmer	New System Infrastructure Support	Technical Management	Executive Office	1	SSS II (T)		1.0			16-17
Interface Analyst	Integration Support	Technical Management	Executive Office	1	Assistant ISA	1.0				12-13
Interfaces Lead	Integration Support	Technical Management	Executive Office	1	SSS III (S)	1.0				12-13
OCM Analyst	Org Change Management	Organizational Change Management	Executive Office	1	Staff ISA (Spec)		1.0			16-17
OCM Lead	Org Change Management	Organizational Change Management	Executive Office	1	BTS I	1.0				12-13
PMO Scheduler (formerly PMO Lead, PMO Supervisor)	Project Management	PMO	Executive Office	1	DPM II		1.0			16-17
Policy Specialist	Policy	Management Team	Executive Office	1	SSM I	1.0				12-13
Procurement Advisor	Procurement	Procurement	Executive Office	1	RA	0.0				12-13
Procurement Support	Procurement	Procurement	Executive Office	1	RA	0.0				12-13
Procurement Support/ Contract Management Lead	Procurement	Procurement	Executive Office	1	SSM I	1.0				12-13
Procurement Support/ Technical Analyst	Procurement	Procurement	Executive Office	1	Sr. ISA	1.0				12-13
Programmer	Data Conversion Support	Technical Management	Executive Office	1	Associate Programmer Analyst	1.0				12-13
Programmer	Data Conversion Support	Technical Management	Executive Office	1	Sr PA	1.0				12-13
Programmer	Data Conversion Support	Technical Management	Executive Office	1	Sr PA	1.0				12-13
Programmer	Data Conversion Support	Technical Management	Executive Office	1	Sr PA	1.0				12-13
Programmer	Data Conversion Support	Technical Management	Executive Office	1	Sr PA	1.0				12-13
Project Change Control & Requirements Analyst	Project Management	PMO	Executive Office	1	Associate ISA	1.0				12-13
Project Management Analyst	Project Management	PMO	Executive Office	1	Sr. ISA	1.0				12-13
Project Management Analyst	Project Management	PMO	Executive Office	1	Sr. ISA		1.0			16-17
Refunds Lead	Business Analysis	Business Management	Executive Office	1	BTS II	1.0				12-13
Registration Lead	Business Analysis	Business Management	Executive Office	1	BTS II	1.0				12-13
Report Developer - Research and Stats	Business Analysis	Business Management	Executive Office	1	Tax Research Specialist III			900.0		16-17
Reporting Obligations Lead	Business Analysis	Business Management	Executive Office	1	BTS II	1.0				12-13
Research and Statistics SME	Business Analysis	Business Management	Executive Office	1	Tax Research Specialist III			450.0		16-17
Scheduler	Project Management	PMO	Executive Office	1	Staff ISA (Spec)	1.0				12-13
SharePoint Developer	Project Management	PMO	Executive Office	1	SSS I (T)		1.0			16-17
Systems Analyst	Data Conversion Support	Technical Management	Executive Office	1	Sr. ISA	1.0				12-13
Systems Analyst	Data Conversion Support	Technical Management	Executive Office	1	Staff ISA (Spec)	1.0				12-13
Technical Manager	Management	Management Team	Executive Office	1	DPM III	1.0				12-13

Role Name	Function	Functional Team	BOE Department	Ind per Role (NOT SAME AS PVS)	Preferred Classification	CROS Existing	New Perm	Temp Help	Overtime	SFL-ys
Technical Support and PC/LAN Coordinator	New System Infrastructure Support	Technical Management	Executive Office	1	Staff ISA (Spec)	1.0				12-13
Test Lead - Program	UAT	Business Management	Executive Office	1	BTA II		1.0			16-17
Training Analyst	Training	Organizational Change Management	Executive Office	1	BTS II		0.5			16-17
Training Lead	Training	Organizational Change Management	Executive Office	1	BTS II		1.0			16-17
Customer Service Center SME - CSC	Call Center	Business Management	External Affairs Department	1	BTA I			76.0		16-17
Audit Field Office SME	Business Analysis	Business Management	Field Operations Department	2	BTS I				600.0	16-17
Compliance Field Office SME	Business Analysis	Business Management	Field Operations Department	2	BTS I				600.0	16-17
Program Liaison - Local - FOD	Org Change Management	Organizational Change Management	Field Operations Department	38	BTS I				6840.0	16-17
Program Liaison - Local - FOD	Org Change Management	Organizational Change Management	Field Operations Department	2	BTS I				360.0	16-17
BOE Legal Counsel	Contract Management	PMO	Legal Department	1	Tax Counsel III (Supervisor)			180.0		16-17
Legal SME	Business Analysis	Business Management	Legal Department	1	Tax Counsel III (Supervisor)			180.0		16-17
Program Liaison - Local - Legal	Org Change Management	Organizational Change Management	Legal Department	1	Tax Counsel III (Specialist)			180.0		16-17
Customer Service Center SME - Timber Tax	Call Center	Business Management	Property Tax Department	1	BTR				76.0	16-17
Audit SME - SUTD	Business Analysis	Business Management	Sales and Use Tax Department	2	BTS I				607.5	16-17
Business Analyst - Local Revenue Accounting	Business Analysis	Business Management	Sales and Use Tax Department	2	BTS I				150.0	16-17
Business Analyst - Online Services	Business Analysis	Business Management	Sales and Use Tax Department	2	BTS I				150.0	16-17
Business Analyst - Return Analysis	Business Analysis	Business Management	Sales and Use Tax Department	2	BTS I				150.0	16-17
Business Analyst Support	Business Analysis	Business Management	Sales and Use Tax Department	1	BTS I				150.0	16-17
Business Policy Liaison SME - TPD	Policy	Business Management	Sales and Use Tax Department	2	STA II			1350.0		16-17
Customer Service Center SME - SUTD	Call Center	Business Management	Sales and Use Tax Department	1	BTS I				76.0	16-17
Data Analysis SME - DAS	Data Analysis	Business Management	Sales and Use Tax Department	2	BTS I				1215.0	16-17
Data Analysis SME - DAS - Benefit Streams	Compensation Management	PMO	Sales and Use Tax Department	1	BTS I				1215.0	16-17
Data Analysis SME - DAS - Warehouse and BI DB	Data Analysis	Business Management	Sales and Use Tax Department	1	BTS I				900.0	16-17
Deliverable Reviewer - Program	Deliverable Management	PMO	Sales and Use Tax Department	36	STA III			8640.0		16-17
Deliverable Reviewer - SUTD	Deliverable Management	PMO	Sales and Use Tax Department	3	BTS I				3645.0	16-17
Form Developer - SUTD	Business Analysis	Business Management	Sales and Use Tax Department	2	BTS I				303.8	16-17
Program Liaison - Local, SUTD	Org Change Management	Organizational Change Management	Sales and Use Tax Department	6	BTS I				1080.0	16-17
Refunds SME - SUTD	Business Analysis	Business Management	Sales and Use Tax Department	2	STA II			45.0		16-17
Registration SME - SUTD	Business Analysis	Business Management	Sales and Use Tax Department	2	BTS I				151.8	16-17
Report Developer - DAS	Business Analysis	Business Management	Sales and Use Tax Department	1	BTS II				600.0	16-17
Reporting Obligations SME - SUTD	Business Analysis	Business Management	Sales and Use Tax Department	1	BTS I				76.0	16-17
Video Communications Specialist - Internal	Org Change Management	Organizational Change Management	Sales and Use Tax Department	1	BTS II				607.5	16-17
Report Developer - SUTD Audit	Business Analysis	Business Management	Sales and Use Tax Department	1	BTS I				600.0	16-17
Report Developer - SUTD Compliance	Business Analysis	Business Management	Sales and Use Tax Department	1	BTS I				600.0	16-17
Audit SME - STFD	Business Analysis	Business Management	Special Taxes and Fees Department	1	BTS I				303.8	16-17
Business Analyst - Return Processing, STFD	Business Analysis	Business Management	Special Taxes and Fees Department	2	BTS I				150.0	16-17
Business Policy Liaison SME - STFD	Policy	Business Management	Special Taxes and Fees Department	1	STA II			900.0		16-17

Role Name	Function	Functional Team	BOE Department	Ind per Role (NOT SAME AS PV5)	Preferred Classification	CROS Existing	New Perm	Temp Help	Overtime	SPLY
Customer Service Center SME - STFD	Call Center	Business Management	Special Taxes and Fees Department	1	BTS I				76.0	16-17
Data Analysis SME - PPAB	Data Analysis	Business Management	Special Taxes and Fees Department	1	BTS II				607.5	16-17
Data Analysis SME - STFD	Data Analysis	Business Management	Special Taxes and Fees Department	1	BTS I				607.5	16-17
Deliverable Reviewer - STFD Program SME	Deliverable Management	PMO	Special Taxes and Fees Department	3	BTA III			4050.0		16-17
Form Developer - STFD	Business Analysis	Business Management	Special Taxes and Fees Department	1	BTS I				76.0	16-17
Program Liaison - Local, STFD	Org Change Management	Organizational Change Management	Special Taxes and Fees Department	5	BTS I				900.0	16-17
Refunds SME - STFD	Business Analysis	Business Management	Special Taxes and Fees Department	1	STA II			45.0		16-17
Registration SME - STFD	Business Analysis	Business Management	Special Taxes and Fees Department	1	BTA I			45.0		16-17
Report Developer - STFD Audit	Business Analysis	Business Management	Special Taxes and Fees Department	1	BTS I				600.0	16-17
Report Developer - STFD Compliance	Business Analysis	Business Management	Special Taxes and Fees Department	1	BTS I				600.0	16-17
Reporting Obligations SME - STFD	Business Analysis	Business Management	Special Taxes and Fees Department	1	BTS I				76.0	16-17
Revenue Accounting SME - STFD	Business Analysis	Business Management	Special Taxes and Fees Department	1	BTS I				76.0	16-17
Business Rules Developer - TSD	Service Management	Technical Management	Technology Services Department	2	Staff ISA (Spec)				1215.0	16-17
Business Rules Technical Administrator - TSD	Service Management	Technical Management	Technology Services Department	2	Staff ISA (Spec)				607.5	16-17
Data Management Analyst	Data Conversion Support	Technical Management	Technology Services Department	1	Staff ISA (Spec)				1215.0	16-17
Data Warehouse Developer	Data Analysis	Business Management	Technology Services Department	1	SSS II (T)		0.5			16-17
Data Warehouse Support SME - TSD	Data Analysis	Business Management	Technology Services Department	2	SSS III (T)			1350.0		16-17
Database Administrator - TSD	New System Infrastructure Support	Technical Management	Technology Services Department	1	SSS II (T)			675.0		16-17
Database/Application Monitoring Analyst	New System Infrastructure Support	Technical Management	Technology Services Department	1	SSS II (T)		1.0			16-17
Deliverable Reviewer - TSD	Deliverable Management	PMO	Technology Services Department	1	DPM II			180.0		16-17
Deliverable Reviewer - TSD (formerly TSD Deliverable Reviewers)	Deliverable Management	PMO	Technology Services Department	36	Staff ISA (Spec)				5832.0	16-17
Documentum Integration Specialist -TSD	Integration Support	Technical Management	Technology Services Department	1	SSS II (T)			1350.0		16-17
ECM Content Infrastructure Support	New System Infrastructure Support	Technical Management	Technology Services Department	1	SSS II (T)		1.0			16-17
Enterprise Architecture Specialist - TSD	Data Conversion Support	Technical Management	Technology Services Department	1	DPM II			450.0		16-17
Form Developer - TSD	Business Analysis	Business Management	Technology Services Department	1	Staff ISA (Spec)				303.8	16-17
Infrastructure Security Monitor - TSD (Former Server Monitoring Analyst)	New System Infrastructure Support	Technical Management	Technology Services Department	1	SSS II (T)		1.0			16-17

Role Name	Function	Functional Team	BOE Department	Ind per Role (NOT SAME AS RYS)	Preferred Classification	GROS Existing	New Perm	Temp Help	Overtime	SFLYr
Infrastructure SME - TSD	New System Infrastructure Support	Technical Management	Technology Services Department	1	SSS II (T)		1.0			16-17
Infrastructure SME - TSD	New System Infrastructure Support	Technical Management	Technology Services Department	2	Staff ISA (Spec)				615.6	16-17
Interface Programmer SME	Integration Support	Technical Management	Technology Services Department	1	Sr PA			450.0		16-17
MRE Reviewer - TSD	Management Performance Reviews	PMO	Technology Services Department	1	DPM II			450.0		16-17
Program Liaison - TSD	Org Change Management	Organizational Change Management	Technology Services Department	3	Associate ISA				911.3	16-17
Report Developer - TSD	Business Analysis	Business Management	Technology Services Department	1	Staff ISA (Spec)				600.0	16-17
Scheduler - TSD	Project Management	PMO	Technology Services Department	1	Sr. ISA			1350.0		16-17
Security Administrator - User Security Group (formerly Security Administrator)	Technical Testing Support	Technical Management	Technology Services Department	1	Staff ISA (Spec)		1.0			16-17
SharePoint Administrator - Back End - TSD (formerly SharePoint Administrator - Infrastructure)	Service Management	Technical Management	Technology Services Department	1	SSS II (T)		1.0			16-17
SharePoint Administrator - Front End - TSD (formerly SharePoint Administrator- TSD and SharePoint Administrator - Infrastructure)	Service Management	Technical Management	Technology Services Department	1	Sr. ISA		1.0			16-17
Tax and Fee Developer - TSD	Service Management	Technical Management	Technology Services Department	4	Sr PA			6304.0		16-17
Technical Change and Configuration Manager (former ITIL change manager)	Service Management	Technical Management	Technology Services Department	1	Sr ISA (Sup)		1.0			16-17
Technical Testers - TSD	Technical Testing Support	Technical Management	Technology Services Department	1	Sr. ISA		1.0			16-17
TMS Support Analyst (Former Server Monitoring)	New System Infrastructure Support	Technical Management	Technology Services Department	1	SSS II (T)		1.0			16-17
TSD Legacy Lead SME	Data Conversion Support	Technical Management	Technology Services Department	8	DPM II			1440.0		16-17
TSD Service Desk Analyst	New System Infrastructure Support	Technical Management	Technology Services Department	1	Staff ISA (Spec)		1.0			16-17
Web Services Specialist	Communication	Organizational Change Management	Technology Services Department	1	Staff ISA (Spec)		0.5			16-17
BOE Overhead								3406.3		
BOE Overhead									45.8	
Totals						62	22.5	20.7	40,965.4	